Towards the Next Epoch of Education

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Towards the Next Epoch of Education

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Towards the Next Epoch of Education
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Preface

Nikolay Popov

20th Volume of BCES Conference Books

This is the 20th Volume of BCES Conference Books. It contains selected papers submitted to the 20th Jubilee Annual International Conference of the Bulgarian Comparative Education Society (BCES), conducted virtually in June 2022.

The 20th BCES Conference theme is *Towards the Next Epoch of Education*. The theme is focused on problems, discussions, changes, solutions, and challenges that have recently happened, and as well on various opportunities, prospects, and advantages that have been made available to all actors in the educational systems around the world – students, parents, teachers, administrators, psychologists, principals, faculty members, researchers, and policy makers at municipal, regional and national level.

The volume includes 33 papers. As always, the book starts with an introductory piece, and the other 32 papers are divided into 6 parts representing the BCES Conference thematic sections:

1) Comparative and International Education & History of Education (4 papers);
2) International Education Issues (7 papers);
3) School Education: Policies, Innovations, Practices & Entrepreneurship (9 papers);
4) Higher Education & Teacher Education and Training (4 papers);
5) Law and Education (2 papers);
6) Research Education & Research Practice (6 papers).

This year, the BCES Annual Conference is very special – it is the 20th jubilee edition of this international event.

The Bulgarian Comparative Education Society was established in 1991 in Sofia, Bulgaria. In 2002, the BCES organized its first international conference merely as an attempt to gather colleagues from different parts of the world and discuss matters of common research and academic interests. This initiative had no big plans, no high expectations, no pretentious considerations. The BCES purely wanted to become an integral part of the global educational process and organizing such a conference was its way of making this possible. The conference began as a modest effort, progressing along a journey, resulting in it becoming an established international educational gathering. Fortunately, this effort to establish the conference on the international stage, resulted in it gaining much appreciation from colleagues in

countries in all continents. It very quickly became a well-known event, with very good prestige, and attracting international interest.

The BCES Conference journey has so far continued for 20 years, involving more and more followers and making more and more friends worldwide. Because this conference means friendship, honesty, reliability, trust, respect, support, and understanding. People with different origin, background, priorities, race, religion, color, culture, ethnos, and habits attend this event annually. People from the Far East to the west coast of the Americas, from Southern Africa to the Nordics every year present their papers and contribute highly to the conference continuation and further development.

As in all previous volumes, readers can find in this year's edition an eclectic and interesting assortment of research methods, approaches, models, theories, and concepts, and as well as personal observations, critiques, academic experiences, ideas and views.

The BCES Conference journey goes on. Its 20th jubilee event marks another step in a continuing tradition.

May 2022

Prof. Dr.habil. Nikolay Popov
Sofia University, Bulgaria, BCES Chair

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Introduction

Charl Wolhuter

Towards the Next Epoch of Education: The Problem of Periodisation of the History of Comparative and International Education

Abstract

For the scholarly field of Comparative and International Education, which uses the reconstruction of its historical evolution to define itself and to chart a trajectory for its future development, the periodisation of its history assumes special importance, more so in times when a next or nascent epoch of education needs to be factored in this stock-taking exercise of past, present and future. This paper surveys the present stock of periodisations in use in the field and found these wanting. One urgent need is that the present phase in the development of the field should be identified, named and described. Besides providing an outlook for the future development of the field, one requirement for building this construct of the present phase in the field, is that it should take cognisance of the nascent epoch in education. This paper offers a set of ideas of the main features of this epoch, in the belief that the discussions contained in the remained of the papers of this book, will contribute towards forming a clear idea of this new or nascent epoch in education and thus contribute towards gaining an intellectual hold on the present phase in the evolution of Comparative and International Education.

Keywords: Comparative and International Education, history, periodisation, education systems, societal context, twenty-first century

Who controls the past controls the future.
A quote from George Orwell's 1949 novel, *1984*.

Introduction

Comparative and International Education has as its object of study education (systems), such systems in their societal contexts, and a comparison of education systems in their societal contexts. Comparative and International Education has proven itself difficult to define, and as a dynamic and ever changing field. David Turner (2019) contends that it is futile to search for a definition of the field of comparative and international education and that the field of comparative and international education gets defined by the discourse taking place (among scholars) in the field. Given this nature of the field, the reconstruction of the historical

evolution of Comparative and International Education gains an importance even more than the historical evolution typically found in the beginning chapters of (introductory as well as more advanced) textbooks surveying scholarly fields of inquiry. It is in the historical evolution of the field that the identity of Comparative and International Education becomes visible, that the main lines of inquiry and topics that scholars have focused on becomes clear, and through which new lines of investigation are suggested (Wolhuter, 2001, p. 1).

In the reconstruction of history, periodisation is a key tool, to gain a grip on the complexity of history. However, the periodisation of its history has never been seriously interrogated by scholars in the field of Comparative and International Education, and even in the scholarly discipline of History, it has only very recently been moved into the focus of scholarly attention (Lorenz, 2017). In reflecting in this paper on periodisation in the reconstruction of the history of Comparative and International Education it will be taken that periodisation serves the general function of taxonomy in any field of science, namely basically to render comprehensible, or to reduce to comprehensible proportions, a large and complex set of phenomena. Furthermore, periodisation should create time units with maximum internal homogeneity and maximum heterogeneity between time units. In Comparative and International Education in particular, periodisations should highlight the main moments in the evolution of the field, with respect to all phases, including and especially the present, the descriptor of the phase should encapsulate the main features of the field (that is in the theoretical-methodological echelons of the field, as well as in the object of study, education systems and societal contexts). Moreover, from such a descriptor and from the depiction of the entire time line of the field, it should be possible to extract current challenges and deficiencies in the field and it should also be possible to extrapolate a future dimension: a vision or élan or trajectory for the future development of Comparative and International Education.

In this paper it will be argued that the current systems of periodisation extant in the field of Comparative and International Education are dated and problematic, and especially within the context of the new and next, coming epoch in education, new periodisations should be devised. A ground theorem of the field of Comparative and International Education has always been that education is shaped by societal contextual factors (see for example Crossley, 2019); the same can be said of the field of Comparative and International Education: it is being shaped or should be sensitive to changes in both societal and education system contexts (Wolhuter & Jacobs, 2022).

The paper commences with an outline of salient, defining features of twenty-first century society, and the new epoch in education it will in all probability induce. Then current systems of periodisation currently in use in the field will be surveyed and assessed. In conclusion pointers for a new system of periodisation will be given.

The (probable) defining features of the next epoch

The next epoch of the societal context of education

Based on trends identifiable in early-twenty first century society, the following contours can be drawn as probably defining the next epoch in the world. An ecological crisis is present, threatening not only the survival of the human species,

but even that of the planet. To address this challenge, the notion of sustainable development has gained currency, operationalized by the global community as the Seventeen Sustainable Goals. Demographically the earth is experiencing a population explosion, though it has constantly been losing momentum during recent years and decades, is still pressingly felt in large parts of the Global South. The global population is getting more mobile. Another salient trend of the early twenty-first century is the continued, accelerated technological progress, two facets hereof being the information and communications technology revolution, and the robot revolution. Economically the past decades have been one of growing affluence, and although the incidence of poverty has also declined, inequalities have been growing. Two other economic trends which loom large with respect to the future is the rise of knowledge economies and the fourth industrial revolution. A knowledge economy is an economy where the driving axis of the economy is the production and consumption of new knowledge. The signature feature of the fourth industrial revolution is the blending of the physical, the biological and the digital worlds.

Social trends include the rise of multicultural and diverse societies, and the decline in importance of the primary (family) and the secondary (workplace) social groupings in society. On the other hand tertiary (functional groups for example sport clubs, hobby clubs, or single issue lobbies) are rising in importance. Political trends include the demise of the power of the nation-state and the power vacuum left being filled from two opposite sides — on the one hand international or global (such as the World Bank or the United Nations) or supra-national structures (for example the European Union) and on the other hand geographically lower or smaller order structures at provincial or district or local levels. Other trends in the past decades are democratization, and a general trend of individualization. Trends in the spheres of religion and life and world philosophy include the persistent presence of religion, new forms of manifestation of religion (individualized, less organised, religion blending with spirituality) and the rise of the Creed of Human Rights as moral code of a globalized world.

The resulting next epoch in education

The above identified new societal context asks for a new, next epoch in education. Main features of this imperative, which contrasts with the historically developed features of education systems include individualization, empowerment of each student, making space for creativity, education for global citizenship, and education for human rights. Furthermore, the possibilities which the technological prowess of the nascent fourth industrial revolution open (see Fullard et al., in this same volume), as well as other contextual features such as the ecological crisis, ask for a new consideration and appreciation of the objectives of education and the place of value education.

Periodisation in the reconstruction of the historical evolution of Comparative and International Education

Arguably the most often used periodisations when considering the historical development of Comparative and International Education are those of Noah and Eckstein (1969), naming five phases till the end of the 1960s, and that of Roland

Paulston (1997) focusing developments since the 1960s. Noah and Eckstein (1969) named their phases a phase of travellers' tales, a phase of the systematic study of foreign education system with the intention of borrowing, a phase of international cooperation, a "factors and forces" phase, and a social science phase. The last three phases, taking the story from the 1960s were named by Roland Paulston as a phase of orthodoxy (this is the same as the social science phase of the Noah & Eckstein phraseology), a phase of heterodoxy, and a phase of heterogeneity. Heterodoxy is a phase of the 1970s and 1980s, characterized, according to Paulston, by the appearance of rival paradigms challenging the orthodoxy of the 1960s. The phase of heterogeneity, commencing around 1990, is, according to Paulston, characterized by a proliferation and a toleration of the number and variety of paradigms making up the field. Wolhuter (2001) combines these two periodisations covering the entire history of the field, suggesting that the phases do not represent a sequence, i.e. one stage replacing the preceding, but a progressive expansion of the field, with each stage continuing up to today. However, these two phaseologies, used separately or combined, viewed as a series of successive, mutually exclusive phases or as a progressive expansion of the field, is problematic. It is especially the last phase of Paulston, heterogeneity, that can be criticized on a number of counts. Tallying with a common view as to acceleration in history (Lorenz, 2017), the shorter time periods in succession of phases in the two periodisations sounds logical, however, the abrupt stopping in 1990, lumping the entire period 1990 till present then in one phase, is at variance to both the rest of the periodisations and to the notion of acceleration in history. To suggest that the field has been static contradicts for example the increasing rate of growth in the number of publications in the field (Easton, 2015). To suggest that the proliferation of paradigms is the be all and the end of all in the field the past thirty two years is a gross exaggeration, and turns a blind eye to much activity in the field, more so to seismic changes in the contextual forces shaping education, and to the (Nascent) new age epoch in education. No critical interrogation is encapsulated in such a summary of the field, even less so does any suggestions as to the future trajectory of the field or any elan emanates from it.

Other existing periodisations of the field are as unsatisfactory. Martin Carnoy's (2019) recent portrayal of the history of the field over the past fifty years, in general and at Stanford University in particular, consists of an accumulating number of theoretical orientations and thematic foci added each decade. These are then human capital theory in the 1960s and 1970s, modernization theory in the 1970s, a(n anti-) neo-colonialism orientation in the 1970s, world society theory in the 1970s and 1980s, engagement with the state and education: legitimation, reform and knowledge in the 1980s, the state and education in the 1980s, Comparative Education and the impact of globalization in the 1990s, the impact of evaluation and Comparative Education in the 2000s, and international assessments in the 2000s. Carnoy uses his historical reconstruction as a basis for the reflection of the future development of the field at Stanford and beyond, in the conclusion chapter of his volume. In a recently published volume on leading perspectives in the field, edited by Beverly Lindsay, the preface states that the intention is to reflect on the past and to envision the future, Martin Carnoy (2021) offers the past reconstruction in the first chapter, which he describes a personal journey and summarises the history of the field over the past sixty years as three trends: Comparative and International

Education becoming a social science, an interest in Globalisation, and the rise of International Testing as focus of research.

Besides taking account of the contextual changes currently taking place, as well as well as the resulting changes in education, or new demands posted to education, offering suggestions as to beacons for a new periodisation of Comparative and International Education, or at least for the typification of the present era, should take note of what currently characterizes the field. It is to this that the paper will now turn to.

Current state of Comparative and International Education: Key features

Perhaps the best way to glean the current state of the field and to identify its key features — to return to the earlier citation of David Turner wrote about what constitutes Comparative and International Education — is from content analysis done of articles published in top journals in the field. Two such studies, done on and published in the two top journals in the field (at least top as measured by impact factor) will be discussed here. In the first study, Wolhuter (2008) analysed all 1157 articles published in the *Comparative Education Review* during the first fifty years of its existence, 1957-2006. The conclusion was that the field shows two strong, seemingly opposite trends, namely a tenacious holding onto established traditions and at the same time a broadening. While the world trend of the nation-state losing its once omnipotent status, and of the locus of power moving in two opposite directions, towards regional and global units on the one hand, and on the other, to decentralised and local structures and to the individual, the nation-state remains the most frequent unit of analysis, and considerable scope exists for also including these other smaller and larger units. Literature studies as method of information collection still dominate research in the field. And despite a multitude of paradigms, most Comparative Education studies take place within the factors and forces paradigm, viewing education as the outcome of contextual forces. On themes of research, it seems as if Comparative Education still has not escaped the black box character of the field (which it has had since the era of the factors and the forces), namely to concentrate more on societal shaping forces of education systems, to the neglect of firstly what is taking place in education institutions and systems, and secondly the outcomes of education.

This paper also analyses frequency of themes in terms of five year cycles. In the last five years covered by the analysis, 2002-2006, the articles dealing with societal forces shaping education, the rank-order was: 1. Political factors, 2. Social forces, and 3. Global forces. With respect to articles dealing with education systems *per se* the rank-order of frequency was: 1. Students, 2. Curriculum, and 3. Institutional fabric.

The second study is a recent publication by Jing et al. (2021) surveying all articles published during the past decade, 2010-2019, in the journal *Compare: A journal of Comparative and International Education*, currently, in terms of impact factor, the top journal in the field. They found the most common foci of articles as follows (in order). The authors usually addressed the following research topics: gender, the disciplinary development of Comparative Education and International Education, internationalisation, citizenship education, globalisation, education

policy, teacher education, culture, globalisation, policy, citizenship, education for all, international students, and decentralisation.

Conclusion

Periodisation is a tool, it can even be stated an indispensible too, to get an intellectual grip on the past, to reduce the infinitely complicated past to manageable, comprehensible proportions. In the field of Comparative and International Education, which defies any attempts to pin it down to a simple definition, the reconstruction of the evolution of the field (and by implication periodisation) assumes even more importance, because of its role in portraying the identity of the field and to serve as basis for reflection as to chart a future trajectory of the field. The periodisations extant in the field are however outdated and not suited for the purpose called for. One major caveat is the incorporation of the nascent new or next epoch in education, and the contextual imperatives constituting the antecedents of that epoch. At least one (the present and latest) phase in the development of the field should be identified, named and described. Besides providing an outlook for the future development of the field, one requirement for building this construct of the present phase in the field, is that it should take cognisance and reflect the new or nascent epoch in education. The author trusts that the discussions contained in the remained of the papers of this book and at the conference will contribute towards forming a clear idea of this new or nascent epoch in education and thus contribute towards gaining an intellectual hold on the present phase in the evolution of Comparative and International Education.

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Part 1

Comparative and International Education & History of Education

Louise Fullard, Hennie Steyn & Charl Wolhuter

Handling the Impact of the COVID-19 Pandemic by a South African Secondary School: A Case Study

Abstract

This paper aims to demonstrate how a South African secondary school responded to the negative impact of COVID-19 and still ensures quality education. This paper's final objective is to link this experience to the theme of this book focusing on the next epoch of education. The paper commences with an orientation and autobiographical reflection on the case study-school (cs-school). The findings revealed how this school adopted and established an online digital education solution to ensure the continuation of effective teaching and learning amid, as well as after the pandemic. However, the findings also indicate challenges that this school experienced.

Keywords: coronavirus disease 2019 (COVID-19), online digital education, teaching and learning, secondary school, Learning and Teaching Management System (LTMS), quality education, education systems and Fourth Industrial Revolution (4IR)

Introduction

Globally, secondary school education is facing immeasurable educational challenges because of the devastating impact of coronavirus disease 2019 (COVID-19) since 2020. This has resulted in unprecedented periods of interrupted education, during which learners could not attend schools in the traditional way. To ensure the continuation of quality teaching and learning at schools in South Africa (SA), the Department of Basic Education (DBE) has promoted online tuition for educators and learners.

This paradigm shift, from the traditional brick-and-mortar setting to integrated online digital education, included a blended education and the restructuring of teaching and learning strategies, resulted in schools exploring online education platforms for tuition. One multicultural dual-medium secondary school in the city of Mbombela served as the case study for this research of the change to integrated online digital education induced by the pandemic.

Background

On 11 March 2020, the World Health Organsiation classified the COVID-19 outbreak as a pandemic on an international level (Ghebreyesus, 2020). This pandemic had a direct impact on education internationally. In SA, in March 2020 schools were closed for an indefinite period whereafter a phased-in approach would be adopted to resume classes as from June 2020.

Already in a White Paper in 2004 on e-Education (WP7) (2004, p. 6), the Department of Basic Education envisioned embracing digital technology to transform teaching and learning for the 21st century. However, this did not happen (Matiwane, 2019). By 2020 only a few schools had tablets and/or computer rooms and teachers have not been formally trained to use technology to support their teaching efforts (Jantjies, 2020).

South African schools felt an immediate impact of restrictions to teaching and learning with the national lockdown in March 2020, including, but not limited to, the lost tuition time during the lockdown. The case study-school (cs-school), with 960 learners and 50 educators, was also disrupted and had three days to prepare a strategy to counter the inevitable reality of an initial 21-day lockdown. The quality teaching and learning of the Grade 12 learners at this school posed an extra concern and priority to the School Management Team (SMT) and the teachers. It was decided that alternative online teaching and learning strategies had to be explored and implemented as an interim solution until the school was reopened.

History wrote a new chapter for humankind. It should also be recognised that the development of Technology, Information and Communications Technology (ICT), Artificial Intelligence (AI) and the Internet rapidly expanded. According to Picker (2020), technology keeps evolving and that remote education is a new trend that must be pursued by educators as it offers an additional way of teaching and learning which cannot replace the in-person experience in a classroom but, that these two elements should rather be augmenting each other. Schools should embrace paradigm shifts and change to assist their learners to prepare themselves as global citizens and for international participation.

The Moodle website (Moodle, 2021) explains that this Moodle LMS enables anyone, anywhere and at any time globally to access learning and that students can individually remain consistently engaged. It further defines this platform as being designed to offer educators, administrators and students a safe and secure integrated system as a personalised learning environment. For this study, reference is made to an LTMS instead of an LMS owing to the education interaction between the educator/instructor, which implies the teaching part of the system, and the learner/student, which represents the learning part of the system.

Digital education should have been more seriously addressed in SA with the release of the WP7 in 2004 and it should not have waited for a pandemic to give the process momentum. The COVID-19 pandemic suddenly necessitates a change. The forced change meant there is a desperate need for innovation and training in the field of remote teaching and learning.

Richie and Lewis (cited by Nieuwenhuis, 2019, p. 57) point out that a qualitative research strategy depends on the researcher's knowledge and skills regarding his/her research paradigm, theories and methodologies that underpin the qualitative research tradition. This study was underpinned by social constructivism

combined with an interpretivism research paradigm where the researcher's subjective individual experience about the LTMS as an integrated online digital education delivery mechanism at the cs-school, was shared based on the researcher's autobiographical reflection. This was used as a basic strategy by systematically discussing the processes of implementation and maintenance of a specific digital online platform. To support the autobiographical reflection, participant observation, experience, documentation analyses and a literature study were employed.

The impact of COVID-19 on the national education system

According to Osman (2021), the challenges that the South African education system faces have been highlighted by the pandemic, including disparities in digital literacy, access to devices and the Internet, as well as the inequality of education adversely affecting the poor, as well as physical and emotionally vulnerable people. The short- and long-term negative effects of the impact of COVID-19 seem to be unavoidable and could have led to the loss of about 10 years in human development in the country (Timm, 2021). Timm (2021) also opines that the continually increased dropout rate of learners in education will have a direct impact on productivity in the South African economy and, as a result, the economy where predictions show that the Gross Domestic Product (GDP) of SA could reduce to US$2,6 billion by 2032.

With the third and fourth waves of the pandemic, there has been pressure on the DBE to act by prioritising online digital education options as practical solutions for lost teaching and learning time. Although the DBE and secondary schools used various platforms and ways to try and minimise the disruption in education caused by the COVID-19 pandemic, it is clear that learners in SA did not have equal opportunities to teaching and learning, and that many learners were negatively affected. Measures taken by the DBE and secondary schools ranged from the closure, reopening and rotation options, to try and maximise contact teaching and learning time, the skimmed and revised curricula in each subject, as well as the school-based reorganisation of content onto various platforms, which include the radio, television, zero-rated online education sites and a stable LTMS. Pre-COVID-19 initiatives, which include policies, publications, presentations and proposals to transform South African education to meet the requirements of the 21st century, also formed part of the measures taken by the DBE, although many educators and learners were not adequately equipped through these projects. Secondary schools with the same societal context in SA mirrored similar challenges. Academically, financially and emotionally, the schools were confronted to overcome the influence of this sudden impact that the pandemic had on their core function of providing effective teaching and learning.

The impact of the integrated online digital education system on the quality of education at the cs-school

The cs-school succeeded in its approach to adopt a new teaching paradigm, especially where the learners were no longer solely educator-dependent with regards to teaching and learning activities (Steyn, 2013, p. 5) and provided quality education to its learners by the created learner-centred approach; good facilities, resources and

teachers; relevant curriculum and content; a productive environment; and support from the stakeholders.

According to Wolhuter et al. (2016, p. 5), schools must consider the contextual forces that impact on the future of a school to guide school leaders in formulating strategies to counter future challenges. The following particular external determinants, key to the shaping of the structure and functioning of the cs-school, were identified to prepare it for the challenges it has faced, faces and will face during the pandemic. Firstly, this cs-school had 960 learners that range from the age of 13 to 21 and 50 South African Council for Educators (SACE)-registered educators resulting in a teacher-learner ratio of about 1:33. Another aspect entails the facilities of the school that comfortably accommodated the total number of learners in normal circumstances. According to the prescribed social distancing of 1.5 m between individuals during the pandemic, this school implemented a 50% learner accommodation approach which allowed learners in Grade 8-11 to attend school every alternative day and the Grade 12 learners to attend school daily. With regards to the geographical factors, the cs-school was established in 1975 and learners who attended the cs-school mostly resided in the urban area where the school was located. However, a small number of learners lived in rural areas who needed to travel long distances daily by bus, taxi or their own transport. Most of these learners experienced clear Internet reception and proper connectivity. The few learners who lived in rural areas, as well as areas with poor reception, were challenged and restricted to the opportunity for online education during the school closure. This diverse multicultural dual-medium school with a Christian ethos comprised of at least seven race groups. Furthermore, the cs-school is classified as a quintile five school (quintile one refers to the poorest schools versus quintile five, the least poor schools) that determines its school fees according to the annual budget plan where items are prioritised to meet the educational needs of the learners. However, the impact of the COVID-19 pandemic had a negative financial impact on many of the parents/guardians of the school who previously diligently contributed to the school fees. On the technology front, the teachers and learners of the cs-school were gradually equipped and trained to use interactive boards, digital projectors, computers and software, connectivity, as well operating the South African School Administration and Management System (SA-SAMS) and Small Area Statistics Package (SASPAC) administrative platforms. Therefore, staff and learners had already been exposed to technology in the school, which contributed positively towards the implementation of an LTMS for teaching and learning.

When the cs-school was faced with the challenge of compromising the physical teaching and learning component at school due to lockdown, their priority was to ensure that education continued. This school acted rapidly after the announcement of the President to close schools, with one goal in sight, namely, to secure teaching and learning. A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis was not conducted and neither were long brainstorming sessions taking place to consider the mode of education for the lockdown period impending the school. The cs-school had been offered an opportunity for a specific LTMS hosted on an external website and the system was implemented.

Since 2021, the virtual classroom has extended and accommodates endless opportunities of ICT for the educator to use successfully. One example is the LTMS

that the cs-school implemented and used to a satisfactory capacity by operating it as a successful teaching and learning tool, as well as becoming innovative by facilitating various events on the platform.

This technology on the Moodle LTMS, used by the cs-school, has even more improved and modernised functionality compared to the ICT systems that were available at the beginning of the 21st century. The Moodle administrator (who implemented, operated and maintained the system), initially trained all staff and learners to operate the LTMS and needed to continue equipping the staff in using the instance to ensure its continued operational success. This led to refresher courses being introduced and presented episodically. The administrator also kept staff informed on a WhatsApp group about newly created tutorials based on Moodle functionality on the platform.

The important advantages of emerging ICT in teaching and learning are explained by Steyn (2013, p. 5) to be the fact that learners can engage with content according to their own pace, time and in their own contextual framework in the learning process. An example of this scenario happened throughout the pandemic where the learners at the cs-school were working from home due to school closure and the rotational timetable they followed. The learners needed to engage independently with academic activity. Yeh (cited by Steyn, 2013, p. 5) explains that ICT media and tools allow the same important intellectual and emotional interaction between educators and learners in the virtual environment as in the traditional classroom. Another important advantage of the LTMS is the functionality opportunity it hosts to improve the educator–learner relationship and academic levels. Steyn (2013, p. 5) emphasises that the added value of the specific technology for teaching and learning should first be considered to ensure that it contributes positively to the teacher-learner relationship, as well as the improvement of the academic level before proceeding with the ICT system. In the case of the cs-school, such an added value calculation could not be made before the system was implemented because of the urgency of connecting teachers and learners to continue with the curriculum. Initially, this LTMS was implemented and operational as an SOS vehicle. Fortunately, the educators who optimally used and continued to use the platform during and after lockdown, benefitted academically, as well as relationally.

Apart from the above-mentioned aspects, Steyn (2013, p. 5) also refers to the feasibility and sustainability of the technology-supported project. Fortunately for this cs-school, it led to further expansion to eventually host the LTMS on a hosting site opted by the school. Therefore, the LTMS administrators of the school have sole ownership and full access and control to manage the resources and traffic (users) effectively.

For this cs-school, the effect of COVID-19 shifted their focus from the traditional brick-and-mortar teaching practices to a modernised online digital education solution. Although some individual learners were negatively affected because of their inability to access the LTMS of the school, most learners benefitted and were continually stimulated academically throughout lockdown, as well as the alternative days of non-attendance at school due to the rotational timetable. It was evident that the LTMS limited the negative impact that the COVID-19 pandemic had on education at the school and rather revolutionised the education system at the school.

Conclusion

To encapsulate, from the trial run presented, it can be concluded that the LTMS established at the cs-school to initially combat the impact of COVID-19 on teaching and learning at the school, was found to be a successful online digital education system. The initiative of the cs-school continues to be explored as they proceed to use this platform, combined with other technologies, as a post-COVID-19 education tool. It is recommended that this LTMS can be used to improve the cs-school, as well as to raise the productivity at other schools in secondary school teaching and learning.

To summarise, a vivid example is offered in this case study as to how the negative impact of COVID-19 on South African secondary schools could be opposed by the establishment of a suitable and effective LTMS as an online digital education system. SA needs a fundamental reformation of the entire education system, which urges education specialists to look very closely at available education policies and to preserve the parts of it that further quality education, but to abandon those parts that have not, and moving on to the new normal. Technological knowledge has become a requirement for the 21st-century educator to realise Technological, Pedagogical, and Content Knowledge (TPACK), Substitution, Augmentation, Modification and Redefinition (SAMR) and Critical thinking, Collaboration, Creativity and Communication (4C) teaching and learning models effectively, which is now more than ever a crucial part of everyday educational practice. This implies that educators should integrate the real world into an online digital world that prepares South African learners for the critical skills required by the workplace. With regard to Comparative and International Education as a field scholarship, the establishing modes of context-appropriate online digital education should be placed on the research agenda.

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Virtual Monitoring and Evaluation of Capacity Development in Higher Education Projects: Lessons for the Future

Abstract

Generally, project monitoring and evaluation (M&E) are mandatory actions throughout the project planning, implementation and conclusion phases. Although the terms *monitoring* and *evaluation* go together, evaluation is usually conducted after the project is completed and is typically included as part of the project report, while monitoring is a continuous process of ongoing data collection and feedback. This aspect is often neglected. Although M&E guidelines for practitioners are in abundance, and advocacy for the use of specific models of M&E are aplenty, there is a deficit of scholarly publications on M&E of capacity development projects in higher education in particular. Furthermore, research guiding future M&E endeavours based on lessons learnt before and during the pandemic, is found wanting. The three authors, in different roles, are part of an Erasmus+ co-funded project that aims to build capacity for curriculum transformation through internationalisation and development of Collaborative Online International Learning (COIL). COIL is an inclusive approach to provide all students with virtual internationalised learning experiences without having to travel. Taking an insiders' perspective and sharing our experiences in this project, this paper should inform future M&E of capacity building projects.

Keywords: COIL, project monitoring and evaluation, Erasmus+, results-based monitoring framework, iKudu

Background

South African (SA) universities, and many in the developing and middle-income countries, often engage in collaborative projects aiming to improve the quality of education and bring about greater cooperation among academics from Europe and other countries. Regularly funded by the European Commission, projects focus on a manifold of issues in internationalisation of higher education, including student mobility; research collaboration and capacity development activities; assisting universities from developing nations, for instance to internationalise their curriculum and, recently, to develop collaborative online teaching methodologies. Generally, project monitoring and evaluation (M&E) are mandatory actions throughout the project planning, implementation and conclusion phases. Although the terms *monitoring* and *evaluation* go together, evaluation is usually conducted after the project is completed and is typically included as part of the project report, while monitoring is a continuous process of ongoing data collection and feedback. This aspect, is often neglected. While M&E guidelines for practitioners are plentiful, and advocacy for the use of specific M&E models abound, there is a deficit of scholarly publications on the practice of M&E in higher education capacity development projects. Furthermore, research guiding future M&E endeavours based on lessons

learnt during the COVID-19 pandemic, is found wanting, and this paper intends to address this gap.

Initial experience of monitoring and evaluation

Recognising the importance of promoting learning mobility of individuals and groups, emphasising cooperation, quality, inclusion and equity, excellence, creativity and innovation at the level of organisations and policies in the field of education and thus advancing graduate attributes that include the ability to think globally (European Commission, n.d.), the European Commission often funds projects that support mobility of students to study abroad. One such programme was the EUROSA (Europe-South Africa Partnership for Human Development) project, an Erasmus Mundus Action 2 Partnerships scholarship programme coordinated by the University of Antwerp with the third author as co-coordinator. It promoted mobility for students, researchers, academic and administrative staff from South Africa to Europe (University of Antwerp, n.d.a). The EUROSA team was successful in five consecutive iterations. The evaluation role of these projects was outsourced to two external agencies: one in Europe and one in South Africa (involving the first author).

The external evaluators were invited to review the project at intervals and write a report as per European Commission requirement. External evaluation was driven by the requirements of the funder, and not really used as a mechanism for ongoing feedback and adjustments. However, at the end of the project, the evaluators noted in their report that it was too late to rectify shortcomings that emerged. As such the evaluation report served as a post-project reflection only. They proposed that, in future projects, ideally the monitoring, evaluation and advisory roles should be incorporated within the steering committee (SC) (management team) of the project, starting at the conceptualisation stage.

Academic collaboration for internationalisation of the curriculum

A follow-up project on academic collaboration with the aim of assisting SA universities to internationalise their curriculum, was funded by the European Commission. The *IMPALA* project (Internationalisation and Modernisation Programme for Academics, Leaders and Administrators, a name inspired by an agile African antelope), strived to set up a network of European and SA universities to respond to the needs of the SA higher education community (University of Antwerp, n.d.b). Although the M&E Team[1] was brought in only after the conceptualisation phase, the coordinator sought ongoing advice and feedback from them at the initial stages, as there were misunderstandings, miscommunications and confusion inter alia of roles. To overcome such barriers, and to keep the communication loop open throughout the project, for quick feedback and ability for rectifying action to be taken in real time, the M&E team set systems, protocols and procedures in place that was comprehensive enough to collate and systematically document information. Progress of each section could be tracked, timelines identified for each activity, and delays identified and explanations provided for deviations from original plans. This strategic document, coined the *living document* (LD) took on the role of a master file

[1] Comprising the first author as evaluator and the third author as the special advisor.

that was constantly referred to, as it provided a snapshot of the project at any given time. It was agreed at the conclusion of the project, that this arrangement was extremely useful to keep the project on track to achieve its aims.

Building on the successes of the IMPALA project, and the trust capital developed during this time, a group, coordinated by a South African partner, and co-coordinated by a European university, was awarded subsequent funding for a capacity building in higher education (CBHE)[2] project. The *iKudu* project (named after a larger antelope) aims to build capacity for curriculum transformation through internationalisation and development of collaborative online international learning (COIL). COIL is an inclusive approach to provide all students with virtual internationalised learning experiences without having to travel. iKudu, co-funded by 10 partners in the consortium (five from South Africa, four from Europe and one from the UK), was conceptualised to run for a period of three years and is funded to the value of almost EU 1 000 000 from the European Commission (iKudu Consortium, 2019).

Taking the insiders' perspective and focusing specifically on our experiences in this project (one as the evaluator, one as a special advisor, and one as working group (WG) leader), this paper considers how lessons learnt during this project could shape M&E of future capacity building projects.

Results-based monitoring and evaluation

M&E consist of three broad phases, namely I) planning, II) monitoring, and III) evaluation. Kimani (2014, p. xii) explains that during monitoring, data is systematic and frequantly collected on specific indicators, and it implies "watching and checking something over a period of time in order to see how it develops, so that you can make any necessary changes". Evaluation on the other hand, involves the "systematic and objective assessment of the design, implementation and results of an ongoing or completed project" and is more concerned with the longer-term outcome and impact of the project (Kimani, 2014, p. xii). In iKudu, we agreed on the results-based monitoring and evaluation (RBME) framework as a systematic approach to track results and performance, based on its reflective, logical and results-oriented approach to measure impact. Stakeholder participation is one of the key components of a successful RBME system (Kusek & Rist, 2004). The ten steps linked to the three phases can be placed on a continuum, rather than considered distinct moments.

Planning starts with 1) the readiness assessment, to evaluate an organisations appetite for, and commitment to M&E. It goes beyond the *how* to also consider *why* M&E is important. During this phase roles should inter alia be considered, and barriers to effective M&E should be identified (Kusek & Rist, 2004).

The next four steps relate to detailing the RBME framework for the project namely 2) agreeing to outcomes of M&E; 3) selecting key performance indicators (KPIs) linked with the outcomes; 4) collecting baseline data on the indicators to understand the status quo; and 5) planning for improvements, and selecting specific tangible results targets (Kusek & Rist, 2004).

[2] KA2 Erasmus+ Cooperation for innovation and the exchange of good practices (capacity building in the field of Higher Education).

Once the project starts, 6) monitoring, based on the agreed framework commences and continues throughout the project involving all stakeholders. As the project unfolds, the results are carefully monitored by regularly collecting data from stakeholders, and reporting to the stakeholders on progress in terms of the agreed-upon KPIs. This ensures that focus is kept on what the project set out to achieve (Kusek & Rist, 2004). Kusek and Rist (2004, p. 113) explain that continuous monitoring uses the indicators to observe the "direction of change, the pace of change, and the magnitude of change", but also to "identify unanticipated changes".

The third leg of the RBME framework is 7) to assess "relevance, efficiency, effectiveness, impact, and sustainability" (Kusek & Rist, 2004, p. 114). The purpose of evaluations is to use the insights to make decisions for the future. Such decisions could include, but is not limited to change in resource allocation, change in management strategy, and build consensus on ways to deal with specific problems. Importantly the 8) findings must be reported, not only internally, but specifically to the funders, taking into account the audiences of the different reports. The organisation must 9) apply the findings to advance the aims of the project including ensuring that the M&E process 10) become part of the organisational culture (Kusek & Rist, 2004).

Lessons from the iKudu Project

With some additions and modifications, we are implementing the RBME framework in iKudu, not only in obligation to the funder, but as an outcome of the iKudu team's commitment having seen the effectiveness of such an approach in previous projects; the trust capital within the consortium; and also the commitment to sustain the project outcomes beyond the project timeline. The project coordinator and the core team planned from the start how M&E will take place to ensure measurable indicators for every objective. The framework informed how the proposal was written and linked to responsibilities allocated to two[3] working groups (WG), intentionally involving representatives of all 10 partner institutions.

The project kicked off late in 2019, and the RBME-based M&E plan (Kusek & Rist, 2004), allowed for a systematic performance-based tracking and regular face-to-face engagements. Although imbedded in the project application, the M&E team also submitted a formal M&E proposal to the steering committee (SC) for ratification. This consolidated not only M&E under, but also a strong advisory function. When the pandemic threatened to capsize the project, due to the embargo on travel, all activities, including M&E moved online.

Key deliverables

Clear key deliverables built into the project proposal were agreed upon (iKudu Consortium, 2019). Outcome 1, assigned to WG1, deals with curriculum internationalisation and including a baseline study on curriculum internationalisation and transformation in SA; the development, adoption and implementation of policies, strategies, and guidelines relevant to curriculum internationalisation and

[3] Although initially three working groups were set up, each with their own team leader with stated goals, it was later thought efficient to collapse it into two as there was much overlap between them.

transformation; training 50 academics on curriculum internationalisation and transformation and publications.

WG2 was tasked with outcome 2 focusing on COIL exchanges, including creating 55 sustained COIL exchanges; training 55 academic teachers on COIL and developing guiding documents for COIL practice. A minimum of 2 625 students from both Europe and SA were identified to participate in COIL. Specific deliverables for validation and scalability were also defined.

Structures to support and enable

The selected methodology for continuous evaluation combines quantitative and qualitative strategies to track the progress made by each of the WGs. Through quantitative data collection, it is possible to track the submissions of each consortium member, providing relevant data required by management to make decisions and to track progress towards achieving the goals stated in the project proposal. Qualitative data collection, including in-depth interviews, focus groups, collating stakeholder opinions and impression, observation and informal data collection recorded in the LD keeps management and partners informed about the progress made. The M&E team and the SC continuously engage with the LD to recommend strategy change and ways to rectify possible gaps or deviations. In the spirit of the appreciative inquiry approach the groups have adopted (Jacobs et al., 2021), instead of taking a punitive approach, the evaluator and the special advisor engage with, and support institutions that start lagging behind at times. The name of the LD was changed to *Strategic Development Document* (SDD), to emphasise strategic development processes and impact, rather than outputs and deliverables only.

M&E at different phases of the project

Having agreed to apply the RBME continuum for the evaluation process, M&E activities have been included into all phases of the project.

In the *conceptualisation phase*, the M&E team directed the planners towards clear goals and ways to achieve them. In the *planning phase*, the core team was expanded to include people with a clear vision, appropriate skills-set and high trust-level to break the goals down into SMART (Specific, Measurable, Achievable, Realistic, Timebound) objectives. This was a crucial exercise as it set the tone and made the objectives crystal clear. From there the key performance indicators (KPIs) were identified and responsibilities delegated. Once the applications opened, the core team responsible for setting the goals and objectives, contributed to the process of applying by collating information and linking it to the requirements of the funder. An important lesson from our experience is that the application has to be a collaborative effort as it includes narratives and budgeting, but also depends on taking ownership and a sense of belonging. Regular meetings in hybrid form, in addition to phone calls and emails, laid the foundation for this cohesion.

Project launch phase brought together all partners with the aim of creating clear understanding of the goals, objectives, delegated responsibilities, protocols, deadlines, and communication channels. The *project implementation phase* followed requiring of the M&E team to keep their fingers on the pulse of all the different sections that are working towards their objectives. As with the IMPALA Project the

implementation of iKudu was also initially beset by some confusion regarding roles and responsibilities. Establishing the SDD early on mitigated this, bringing equilibrium and stability. This document had been drawn up just before the implementation phase. Soon after the project administrators were trained in collating, capturing and documenting information and making it available to project management, implementation teams and participants. Thus, any misunderstandings or confusion that might have arisen was pre-empted and managed. Another challenge identified soon after embarking on the project, related to meeting deadlines and taking decisions at SC meetings. This resulted in introducing the LPT (Local Project Team) report. To advance impact and sustainability, the LPT also records institutional highlights, conferences, webinars and publications, and records institutionalised implementation, and ensures the regularity of institutional meetings. Short and to the point questionnaires are sent out to all institutional coordinators, prior to each SC meeting to indicate if and how what was agreed upon at the previous meeting, was executed. This information is then concisely shared at the SC. It has proven to be a non-confrontational way to hold participants accountable without alienating them. The information collected is transferred to the SDD after the SC. This strategy has stood the project in good stead as it not only gives timely feedback to project management and members but also acted as a source of information for writing up and submitting the mid-term report to the funding agency (accepted and awarded a 'good' grading by them). An unplanned and debilitating COVID-19 lockdown announced during this phase put the project in jeopardy. However, all activities were taken online and the concise, timely feedback through the LPT reports and the growing SDD kept the project on track. Online SC meetings were now held monthly, instead of in-person with longer intervals in-between. The M&E team regularly engage with the WG leaders to keep track of project deliverables, and where challenges arise, intervene in a supportive manner.

The iKudu project is still in its implementation phase. However, the *concluding phase* has been planned, ensuring that all pertinent documents and evaluation reports are collated and filed. This will also be a time to reflect on how the M&E function could be further improved for the next project based on feedback on participants' experiences while working on the project. The M&E team must then work with the core team to ensure that all relevant information is disseminated to all stakeholders during the *project reporting phase*, and to assist the core team to reflect on the journey and ensure that sustainability plans mentioned in the project proposal are set in place.

Reflection

Reflecting upon the successes of the approach, described above, the following are crucial for the success of projects. Gap identification needs to happen constantly to ensure progress at all institutions towards objectives. The M&E team, alongside the stakeholders, should always keep the deliverables and final product or destination in mind. For instance, a tangible destination in the iKudu project is establishing 55 COIL exchanges by partners in the consortium, and the reporting on this in different committees happens throughout. Tools such as the LPT reports and the SDD need to be used as it improves efficiency through timely feedback. We have also learnt that one should not wait until the end to engage the donor in the

project. We, for instance seek advice from the representative of the Erasmus+ by inviting her to some of our meetings, such as the reflective meeting at the beginning of the second year into the project.

The position of the M&E team will always be somewhat of an insider-outsider. The reality is that the project pays your salary, the funder appoints you, the beneficiary trusts you and the implementers want honest feedback. It is important that, in spite of being part of the core project team, the evaluators retain their independence towards ethical M&E.

Conclusion

We argue that M&E, together with an advisory function, should be a continuous process and that the portfolios must be embedded within the project management team. The focus then shifts from pure delivery, to assuring long-term impact and sustainability. Still, it is important that the M&E team maintains their independence so that the ability to criticise, provide honest feedback and give advice on critical operational matters is not compromised.

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International Perspective on Managing Racial Integration in Secondary Schools

Abstract

The notion that educators are committed to effective facilitation of racial integration in secondary schools has become the keystone in developing a socially just schooling system in South Africa. This paper sets out to determine the role educators play in the transformation of schools towards racial integration, as well as their nature and perception in facilitating racial integration in the truest sense. Findings emanating from this research indicate that the striking down of the policies and educational system of the Apartheid regime has propelled educators from segregated backgrounds into teaching learners from different racially diverse backgrounds. Similarly, most learners for the first time are being taught by racially diverse educators. A qualitative framework is used to investigate firsthand experiences of managing racial integration in relation to educators and school management, and their role in determining successful racial integration in secondary schools in South Africa. The purpose of this paper is to prepare educators with the accumulative knowledge, understanding and tenets of the Critical Race Theory (CRT) on how to create opportunities for decolonising classroom content and practice as well as addressing the weaknesses in previous approaches to racially integrate learners in desegregated schools.

Keywords: racial integration, management, secondary schools

Introduction

The South African system of apartheid seriously affected the nature of educational provision. Apartheid education reflected a segregated and enforced social inequities, schooling was used as a tool to distort the values and identities of learners. Every aspect of schooling was regulated to race; educational budget provisions, the structure of education bureaucracies, the composition of staff and learners in schools, the kind of curriculum followed, and the ethos prevalent in schools (Seekings, 2008). The foundation of apartheid was the system of race separation enshrined in law by the 1950 Population Registration Act (Seekings, 2008). The Act provided for all South Africans to be classified into one of four basic racial categories: Whites, Africans (Blacks), Coloureds and Indians. The Bantu Education Act, Act No 47 of 1953 created a separate educational system for African students under the management of the Department of Bantu Education which compiled a curriculum that suited the nature and requirement of black people.

The South African Schools Act 84 of 1996 catalysed the Bill of Rights and the South African Constitution, formalised the desegregation of schools in South Africa, and created the opportunity for students from diverse cultural backgrounds to attend schools of their choice (Vandeyar, 2008). In view of the apparent dearth of information on the life of desegregated schools, research was undertaken to explore

the experiences of school management and governance structures in managing racial integration in public secondary schools.

Background

Since the advent of the democratic order in South Africa numerous structural and systemic changes were brought about by the Constitution (1996) which provides a 'rationale for the geographical redefinition' to desegregate South Africa into a racially inclusive nation (Carrim, 1998). In addition, the Constitution makes provision for fundamental human rights which is catalysed by the Bill of Rights (Act No 108, 1996) where everyone has the right to basic education and to further their education which the State must make available and accessible (Vandeyar, 2008).

The South African Schools Act (SASA No 84 of 1996) formalised the desegregation of schools which redressed the legacy of the apartheid policies. As a direct response racial integration was driven as part of the education reform to accommodate the diverse nature of society. This gave rise to the following problems: Firstly, learners experienced great difficulty coping with the academic, social and emotional challenges given that learners came from historically disadvantaged backgrounds (Meier, 2005). Secondly, efforts were made to capacitate school leadership and management; however, there remains a significant problem in school governance structures to cope with the challenges and the overwhelming tasks to successfully integrate racially diverse learners and educators. Lastly, a plethora of policies and legislation were developed to augment significant reform in its education system. However, the problem with implementation persists which, undermines the realisation of an impressive policy architecture required to make a profound difference to teaching and learning in public secondary schools.

According to Vandeyar (2003, p. 193) diversity refers to the educator, learner and society that are inextricably linked to societal values, cultures and practices. Given the complexities of the systemic and structural problems, racial integration to a significant degree reflects the larger political and social problems in South African society. The literature reinforces and expands on the issues in this regard that both the macro (national) and micro (school) elements of transforming schools from assimilation to multiculturalism did not completely and holistically lead to successful racial integration.

Consequently, this led to continued marginalization and retention of exclusionary approaches in an attempt to maintain 'standards' (Carrim, 1998). The failure to translate the macro initiatives to impact and address racism and other forms of discrimination will continuously undermine the intention to totally transform the schooling system and design if it does not relate to actual realities on the ground of how racism is "perceived, understood, experienced and reconstructed" (Carrim, 1998, p. 11).

The dominant approaches of assimilation, colour-blindness; the contributionist, and multicultural education underpin the debates of managing racial integration in secondary schools. These approaches explain and illustrate how complex interrelatedness of socio-economic, historical and cultural values influence school life of learners and educators. Meier and Hartell (2009) have stipulated that these approaches are limited and insufficient in dealing with 'mixed race' groups. One is aware that the current thinking around racial integration has not been adequately

managed in secondary schools in South Africa. Hence, the specific focus of this paper is on racism and racial integration in public secondary schools.

Critical Race Theory (CRT) examines the "complex relationships between and among race, racism and jurisprudence" (Vandeyar, 2008). CRT seeks to understand how mono racial schools create and maintain the dominant culture as supreme over diverse learners. Their focus is on changing the bonds between law and racial power. By incorporating focus group discussions and individual interviews in this study, CRT uses multiple interpretative methodologies to analyse the narratives of those who have been victimized by the legal system so that I can understand "socially ingrained" and "systemic" forces at work in their oppression (Pizarro, 1999).

CRT was explored as a valuable approach for thinking through different ways of managing racial integration in South African secondary schools. For this to happen, CRT is used as a theoretical lens through which the study can be interpreted, the power imbalances of learners and educators can be revealed, the possible ideologies that are culturally and historically prescribing racial inequity can be further investigated (Maree, 2007).

General orientation to the problem

The harsh reality that is illuminated by the literature which draws on the notion that the problems of managing racial integration in schools are multiple; especially for those schools whose population have been derived from one race (Chisholm, 2004). Unless reflections on the management of racial integration receive urgent attention, the situation can potentially become volatile. Furthermore, school management need to be re-engineered into purposeful vehicles of change that will facilitate the development and the mind set of educators and managers in racially diverse schools. Our belief is that emphasis on the above critical issues must be taken into consideration otherwise there may be many possible disastrous consequences not only to schools but to national reconciliation.

Literature review

International views on racial integration as well as some perspectives of the history of the South African education system in the apartheid era are explored. A detailed account of literature concerning the approaches of racial integration is given, with an overview of critiques of approaches used in the United Kingdom, United States of America, Canada and South Africa in order to show that they are not the solution to effective racial integration in racially diverse classrooms. The central issue of racial integration in public secondary schools and the history of race in the context of education in South Africa are discussed. As well as the theoretical framework informing the management of racial integration in secondary schools, notably critical race theory (CRT).

International perspective

Racial integration in schools has been a problem internationally as well as in South Africa. The three countries cited above were chosen because they have been

characterised as nations of racial diversity, clearly traceable to the period after World War II. The diversity has been and continues to be enriched by indigenous Africans (Blacks) and a large number of immigrants and refugees from countries around the world. The influx of immigrants led these countries to develop innovative practices toward racial integration.

The United Kingdom

The process of a racially integrated schooling system was introduced in the UK in response to Black immigration after World War II. During the 1960s, assimilation was the first approach adopted in an effort to assimilate or incorporate Blacks who were not British, which eventually translated to race (Black and White). It was based on the belief that for Blacks to be integrated into society, an education policy was required that de-emphasized the minority groups' racial and cultural differences and stressed a British identity. Assimilation was aimed at integrating 'alien' Blacks into the ways, language, lifestyles and values of British people, therefore denying their ethnic origins and identities. Furthermore, it was hoped that mixing the diverse groups on the basis of racial tolerance would lead to an integrated nation (Carrim, 1995). After the failure of assimilation, a multicultural education approach was adopted during the late 1960s and early 1970s to combat racism. Although multicultural education was suggested as a solution, but this did not address or prevent the issues of institutional racism because the main goal was to render Black learners "politically, socially and culturally compliant" (Lemmer & Squelch, 1993).

The United States of America

Racial integration in US schools began after the 1966 race riots which shocked the American nation, as the government attempted to address racial problems and promote racial integration by introducing the assimilation approach. Assimilationists' primary goal in education was to 'Americanize (Anglicize)' the multiracial immigrants (American Indians, African Americans and Mexican Americans) and help them to acquire the language, values and behaviour needed to succeed in American English culture and its institutions. The assimilation approach was unchallenged during this period, since it was understood by minority group leaders and the majority of group leaders as the proper societal goal. However, it promoted social injustice which stripped Black learners' identity, culture, language and traditions. The failure to effectively integrate Black learners led to an alternative approach, namely multicultural education. Banks (1984) proposed three dimensions to achieve this "holistic multicultural education in a pluralist democracy", namely maintenance of a dynamic diversity, acceptance of the need for social cohesion, and a commitment to greater equity from the principal and educators (Lynch, 1989, p. 24).

Canada

Unlike the UK and the USA, which focused on assimilation, the Canadian government focused on addressing the issues of racism and racial segregation. In 1963, a Royal Commission on Bilingualism and Biculturalism investigated the relationships between English and French regarded multicultural education as a status quo and produced social and economic inequities that illuminated the

difference between the different racial groups based on status. Antiracist education did not effectively integrate the diverse racial groups and had no interest in dealing with the concerns of the minority groups.

The weaknesses of the different racial integration approaches in the UK, USA and Canada

The weaknesses of the various racial integration approaches as they unravel in the United Kingdom, the United States of America and Canada will be discussed in this section. It is important to note that although these racial integration approaches started after World War II, however none of the approaches began simultaneously in any of these countries. The development in one country may have been the result of that in another country.

Weakness of the assimilation approach

The assimilation approach to racially integrate minority groups or Black African learners was absorbed in the ethos of the school and the majority racial group. This meant that they had to adopt the language, culture and value of the school while foregoing their languages, culture and values. According to Carrim (1995) the assimilation approach led to the inclusion of Black learners into the way of life of the majority group but did not make any effort to engage with the minority group.

Weakness of the multicultural approach

Multicultural education did not address the issues on institutional racism (Banks, 1984), and lacked the necessary strategies to enhance critical engagement among racially diverse groups. Gallagher (2004, p. 91) states that multicultural education did not "prevent racism but rather promoted it", some of the aims being to make Black learners politically, economically, socially and culturally compliant. It failed to address the principles of social justice and human value.

Weakness of antiracist education

The failure of antiracist education lies in its inability to cultivate critical thinking skills and openly discuss challenges of racially diverse learners that can enable them to connect and belong to an education system in which social justice and effective integration is practiced. According to Naidoo (1996, p. 38) the weakness of antiracist education is its incapacity to display an "awareness of nuances, contradictions, inconsistencies and ambivalences".

The education system in apartheid South Africa

The problem of racial integration is more profound in South Africa because of apartheid education, which impacted on the collective and individual psyches of all South Africans, Black, White and others (Nkomo, McKinney & Chisholm, 2004). The historical development of education for the integration of racially diverse public secondary school communities in South Africa can only be effectively evaluated against the backdrop of the educational history of the country. Although desegregation only began in 1993, there were only 60,000 Black students at Model

C schools, a way of keeping schools White, and about 40,000 'African' and 'Coloured' learners at 'Indian' schools. By the end of 1995, African learners at Coloured, White and Indian schools did not exceed 15% (or approximately 200,000) of the total learner enrolment (Vally & Dalamba, 1999). In October 1990 desegregation took place to a limited extent in White state schools following educational change. According to Vally and Dalamba (1999, p. 10), this meant that Black African learners could be admitted into White state schools on condition that they all maintained a 51% White majority in their population; secondly, the White cultural ethos of the school had to remain intact; thirdly, the management council of the schools did not necessarily promote the employment of Black teachers on the staff of the schools; lastly, the financing of Black learners at these schools was the responsibility of the parent/s.

Findings

The years of turmoil have taken a heavy toll on the infrastructure of our education and training system. The South African Schools Act (SASA) No 84 of 1996 is the primary Act that regulates schools, its focal point being to revoke all apartheid past laws pertaining to schools, abolishing corporal punishment and admission tests, and providing compulsory education and a cohesive schooling system. Democracy has led to changes in the education system. In May 1994 a new Department of Education was established by proclamation, amalgamating all 18 departments of education, based on race, into one national and nine provincial departments. The opening of White (former House of Assembly) schools to Black learners was a major issue at the beginning of the year 1995.

The South African Human Rights Commission (2002, p. 4) stipulates that for racial integration to take place in schools racism needs to be acknowledged as a structural facet of society and be understood in its historical context. Many schools in the township remain mono-racial because of the apartheid system. However, over 20 years later the era of social harmony, development and prosperity still seems far-fetched. Media frequently reports that schools are characterized by tension, ignorance, misunderstanding and aggression as a result of the mismanagement of diversity (Meier, 2005).

Many educators lack the training and understanding on what the meaning of values in education is and how to translate the curriculum to promote racial integration in diverse classrooms. Educators need to be empowered to monitor the experiences and classroom practices of racially diverse learners and how they react to the values that are consistent with the curriculum. Educators should be compelled to participate on regular courses on racial integration in diverse classrooms in the hope that these programmes will empower school management and governance structures to value, teach and interact with racially diverse learners.

An ethos needs to be established to advocate a culture of non-racialism where all facets of the rights of children as described in the Constitution are practiced. A school environment of mutual accountability is fulfilled through a sense of commitment towards the realisation of a shared vision. Effective racial integration requires a collegial relationship between different government departments, school management and governance structures as well as educators that are able to manage the initiatives of the school against racism and racial discrimination.

The need for strong leadership and management to facilitate racial integration

In the policy framework of South African, management of racial integration in schools is embedded in the SASA (No 84 of 1996). The educational policy requires school managers, and educators to work in democratic and participative ways to build relationships among racially diverse learners and ensure effective delivery of education. Despite the end of apartheid in South Africa, the shadow of its ideology continues, no longer through racially explicit policies but by proxy, notably high school fees, exclusionary language and admission policies (Vally & Dalamba, 1999).

The Critical Race Theory (CRT) supports the social justice framework and distinguishes racism as an ingrained facet in schools. Comparatively, in the UK, USA and Canada, as well as South Africa, racism is part of the daily landscape and forms part of the "normal and natural", implying that there are inequitable conditions that occur systematically at policy level as well as overt acts of racism in schools (Foucault, 1972, p. 49). CRT focuses on transforming the curriculum that underpin school management use the tenets of CRT to construct active, dialogic, and dialectical lessons based on the content of the curriculum.

Conclusion

This paper highlighted approaches that are practiced by many educators, these contrived approaches, such as assimilation, colour-blindness, contributionist, and multicultural education are limited and insufficient in actually dealing with racially diverse groups. Many educators lack the training and understanding how to translate the curriculum to promote racial integration in diverse classrooms. The failure to translate the macro initiatives to impact and address racism and other forms of discrimination will continuously undermine the intention to totally transform the schooling system and design if it does not relate to actual realities. Therefore, effective racial integration requires a collegial relationship between different government departments, school management, governance structures including educators that are able to manage the initiatives of the school against racism and racial discrimination.

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The Importance of Acquiring Soft Skills by Future Primary Teachers: A Comparative Study

Abstract

As a nation strives to meet the challenges posed by globalization, which is an issue of the information economy, its strength relies heavily on its citizens' intellectual prowess and critical thinking skills. Thus, institutions of teacher education play a key role in producing teachers who will be able to meet the needs of the time, with empathy, while promoting critical thinking, creative ability and the value system as a priority. Educating teachers to incorporate soft skills is critical for the profession's success. The term 'soft skills' refers to a wide range of personal and interpersonal attributes that are aimed at transforming the individual as well as society as a whole (Apple, 1996). The purpose of this research is to highlight the degree of preparation of future teachers in four large primary education universities in respective European countries. To achieve this, a mixed-mode technique was used by the researcher (questionnaires and semi-structured interviews) to gather information. The target group came from the teaching staff at the faculties of education in four European countries (Spain, Romania, France and Greece). Ten academics from each nation were hand-picked to participate in face-to-face interviews. At the same time, the teaching staff of the teacher training departments participated in a focus group, in groups of 5 people each. The most crucial soft skills in their teaching profession were identified to be social skills.

Keywords: higher education institutions, primary education, soft skills acquisition, teaching profession

Introduction

Graduates of higher education institutions (HEIs) are expected to have both hard and soft skills. As a result, it is the obligation of higher education institutions to ensure that their graduates acquire sufficient holistic skills to be successful in their careers. However, soft skills still remain a problem for graduates, although trainee teachers must have soft skills since they will be future educators. This paper discusses the role of HEIs in developing soft skills in primary teacher graduates. The present study applied a mixed methodology to explore the respondents' soft skills development, including (a) "critical-praxial" thinking (Hurdakis, 2020) and problem-solving skills, (b) entrepreneurial skills, and (c) moral and professional ethics, based on their primary teaching program. Academic teachers from Faculties of Education in four European countries (Spain, Romania, France and Greece) are the target group.

In general, the research showed that the lecturers perceived the Faculty of Education program to have sufficiently developed their critical thinking, problem solving, entrepreneurial, moral and professional ethics skills. It is possible to improve the program in order to enhance their development of soft skills so as to enhance the standard of instruction and learning and to improve their employability.

This information can be used to develop primary teacher programs in HEIs that take into consideration the ongoing needs of stakeholders like schools and society in general, when redesigning the curriculum for Teacher Education programs.

Trainee teachers, like other graduates, require a certain set of soft skills in order to better respond to the demands of the education industry and society. Teachers must be taught soft skills so they can provide good and effective instruction (Tang, 2018; Häkkinen et al., 2017). HEIs, on the other hand, are having a hard time developing these soft skills among their students. Although lecturers recognize the need of incorporating soft skills into the curriculum, they have yet to do so in their pedagogy. This is due to a number of obstacles, including a large classroom setting, a limited amount of time, and other factors although the importance of soft skills is also acknowledged by students as well as time constraints (Ngang et al., 2015).

Community skills and character traits selected by a lecturer should include soft skills as a standard element (Tang & Tan, 2015). An excellent professor should be dedicated to his or her work and capable of taking charge. To effectively complete the obligations of the classroom, teaching is a comprehensive performance that requires a broad variety of knowledge and talents, including both kinds of skills (hard and soft) (Sakellariou & Mpesi, 2014). Teaching is a social, shared activity in which the lecturers and the students work together. Teaching style can be defined as a collection of behaviors. As a result, teaching ability encompasses more than just the simple conveyance of knowledge from lecturer to students. Instead, it is a comprehensive technique that facilitates and influences the learning process of students (Karras, 2014). Soft skills, also known as relationship and social skills, are essential for lecturers who work in a high-performance environment, eventually encouraging efficiency. They are thought to improve competency and, as a result, one's ability to support community advancement and transformation (Duncan & Dunifon, 2012). According to Almeida and Morais (2021), a HEI's most effective way of assessing students' and lecturers' future capability is through the use of soft skills.

To modify lecture methods for students, lecturers need to get comfortable with soft skills. In this dynamic learning environment, it will become more organized and operational, based on the lecturers' understanding, talents, and attitudes (Chamorro-Premuzic et al., 2010).

According to Schulz (2008), lecturers are critical in the development of a student's soft skills. To create such human capital, it is necessary to have an education system that is well-versed and well-designed.

Literature review

Universities throughout the world are increasingly attempting to provide their graduates with specialized 'soft' skills to complement traditional 'hard' talents in order to prepare them to thrive in a quickly changing and dynamic world. While hard talents are relatively easy to define and develop, soft skills are not, despite the fact that they are increasingly recognized as equally, if not more, vital. One of the factors in the current study was the relevance of lecturers' soft skills acquisition in their teaching profession. In her article "Constructing 21st-century Teacher Education", Linda Darling-Hammond of Stanford, identifies a number of characteristics of teachers, including an understanding of individual learning styles,

knowledge of socio-culturally sensitive pedagogical content, effective use of technology, a desire for lifelong learning, strong communication, and efficient activity management skills (Darling-Hammond, 2006). Similarly, Kereluik et al. (2013) highlighted three main kinds of knowledge which instructors must possess to succeed in the twenty-first century in a critical evaluation of the literature on twenty-first-century knowledge frameworks with relation to teachers and teacher educators: core content knowledge, digital literacy and cross-disciplinary knowledge are three subcategories of foundational knowledge. Problem solving and critical thinking, communication and collaboration and creativity with innovation, are three subcategories of Meta Knowledge. Life and job skills and leadership, cultural competence and ethical-emotional awareness are three subcategories of humanistic knowledge. Similarly, according to the Pacific Policy Research Center's study of 21st Century Skills for Students and Teachers (2010):

> *... technology is redefining how we learn, the nature of how work is conducted, and the meaning of social interactions. […] Much success is built on the ability to communicate, exchange, and use information to solve difficult problems, on the ability to adapt and innovate in the face of new demands and changing circumstances, and on the ability to command and develop the power of technology to produce new knowledge.*

An education program's purpose should be to prepare students for a career in education. As a result, while hard skills are the most important component of the curriculum, soft skills must also be adequately incorporated for the profession to be successful (Schulz, 2008).

Higher order thinking skills (HOTS) are given a lot of focus in 21st century teaching and learning. HOTS is not a stand-alone subject; it is a skill that lectures and teachers should incorporate into their classes, which is why all teachers must be proficient in HOTS in order to develop that talent in their students. HOTS is important for future teachers and students because it is relevant to the knowledge-based economy and the development of information and communication technology (ICT), particularly in this period of globalization (Yen & Halili, 2015). Apart from possessing critical thinking and problem-solving abilities in order to include them into their teachings, this talent is also required for instructors to employ in learning management for students, which may help them better manage their classroom presence (Karras, 2014). Vital thinking and problem-solving skills are critical for educators, as can be observed. Not just as a talent to inculcate in their future students, but also in the way we currently 'build' the concept of 'citizen' in the context of education's socializing function, these skills must begin with trainee instructors (Calogiannakis et al., 2014).

Methods

Researchers collected data using a mixed mode approach (interviews and focus groups). There were four educational programs offered by various countries, and the target group was all lecturers who were teaching them. The research process started with a carefully designed focus group, of 8 people, in which 2 teachers from each country participated. The main axes that emerged from this research phase contributed to the creation of the research protocol of the final semi-structured

interview (Figure 1). In the face-to-face interviews, forty lecturers were selected in all.

During the face-to-face focus group, we were able to gather information from eight interviewees. The eight lecturers were four females (P1-P4) and four males (P5-P8).

Each of them taught teachers education in the Elementary and Pre-Primary programs. In the following section, we discuss the results of the analysis of the eight interviewees perspectives regarding the teaching profession. The result of the discussion was that soft skills are extremely important.

Figure 1

To learn more about the importance of soft skills in terms of teaching quality from professors, an interview protocol was developed with the seven questions designed for the in-depth interview. Twenty lecturers from the four participating nations participated in the pilot testing, but they were not used as samples in the real study. Three specialists independently validated the substance of the interview and the focus group technique. Content analysis was used to examine qualitative data. (Bryman, 2016).

Results

In general, this study's descriptive findings revealed that in all academic programs, academic teachers followed an identical pattern when it came to the soft skills required in their career as teachers.

The most significant soft skills in their teaching profession were judged to be "critical-praxial" (Hurdakis, 2020) thinking and problem-solving abilities. The sole variation between the four programs was leadership ability, which was discovered to be the least-required talent in teaching.

The results of the content analysis revealed that the skills required for lifetime learning differed significantly. Spain lecturers placed a higher value on lifelong learning than Greece lecturers, while French academics placed a higher value on lifelong learning than Romanian lecturers. Furthermore, there was a substantial difference in teamwork skill across Spanish, French, and Romanian instructors, with Greek lecturers appearing to require more teamwork skill than their counterparts.

Soft skills developed by lecturers are crucial to them, according to the interviewees, in order to give excellent and effective instruction, as specifically stated by P1, P3, P5, and P7.

> *I believe that soft skills are necessary for professors to be exceptionally skilled in all areas in order to excel in this profession. Excellence teachers' communication, critical thinking, and lifelong learning are just a few of the wonderful soft talents that may be acquired and they are the only ones who can deliver excellent teaching.* (P3)

> *Lecturers will be able to understand the diverse students' capabilities and knowledge speeds. This ability also contributes to the development of inspired teaching.* (P5)

> *Being a competent communicator is vital so that practical teaching and learning may take place at the same time. Lecturers need soft skills to be able to use a variety of teaching strategies with students of varying abilities or levels.* (P7)

The majority of respondents said communication skills were the most important in teaching. When lecturers use a variety of teaching techniques, they can reach out to students with varying learning capacities and levels.

> *It's critical for us to produce exceptional lecturers who can collect, comprehend, and disseminate information to our students.* (P1)

> *When accompanied by inspiration, communication skills will generate fascinating and operational learning senses, assisting pupils in remembering new information.* (P4)

> *… since lecturers are only responsible for providing students with academic information.* (P6)

> *It is the most crucial role of a lecturer to conduct the lecture during the teaching and learning process. The manner in which a lecturer delivers his or her lecture will determine whether or not students are able to keep up with the class.* (P7)

The interviewees stated that having such communication abilities would be crucial in conveying operative and excellent teaching. In order to make that judgment, they relayed information on incidents such as presentations, group work, peer adjustment, active learning, open class discussion, cooperative learning, etc., in order to make that determination. Enriching and developing your career P1, P2, and P5 all mentioned the need of soft skills for professional development and enhancement.

They explained how practising good communication skills helped them advance in their careers and enrich their lives.

Soft skills are critical for lecturers to be exceptionally talented in these areas in order to excel in their careers. (P1)

It would be preferable, in my opinion, to maintain a positive qualified interface and deliver competent instruction to students. (P2)

As expressly stated by P4 and P8, the final qualitative conclusion demonstrated that soft skills acquisition is vital for professors to manage their students.

It is critical in regulating students that they be treated with more civility, especially those who are problematic. HEIs' teaching staff have to effectively deal with emotional outbursts both during and after the session. We aim to use this talent to help students manage everyday challenges and get back on track. (P4)

Each event that a professor is confronted with is unique, and lecturers must be prepared with extensive problem-solving skills in order to find the best possible answer to manage the challenges. (P8)

P4 and P6 were asked which students agreed that critical thinking and problem-solving abilities are the most essential soft skills in the teaching profession.

Soft skills are essential in every situation. However, I believe critical thinking and problem-solving abilities are the most crucial. (P4)

The most important soft skills for lecturers, in my opinion, are critical thinking and problem-solving skills. (P6)

Six of the lecturers (P1-P4, P6, and P7) thought the most crucial soft skill was communication for delivering quality and effective learning, based on the qualitative results of the eight interviewees.

Critical thinking and problem-solving skills, on the other hand, were considered as the most significant soft skills for managing students by P4 and P8. Furthermore, P1, P2, and P5 stated that lecturers can improve by practicing reverse communication skills because it aids in their job development and enrichment.

Discussion and conclusion

Based on the distinct mean scores of the four HEIs programs, the results provided average evaluations of soft skill levels. Teamwork was rated as the most important soft skill mastered by lecturers in all four education programs in order to provide their students with the ability to overcome problems that arise often in joint undertakings. Lecturers generally supervised cooperative activities that drew on students' past experiences in order to help them think critically as lifelong learners. The goal was to assist students in discovering and implementing lifelong learning strategies, so that they might improve their collaborative experiences.

Meanwhile, the lecturers stressed the importance of learning communication as the most critical soft skill. They acknowledged the value of effective communication in the classroom, according to this qualitative outcome. They also understand that every student has different skills and shortcomings. A lecturer's communication abilities can also be used to propose unique and effective answers to students' difficulties (Calogiannakis et al., 2014).

Furthermore, instructors in primary education emphasized the need for developing critical thinking and problem-solving abilities as an important soft skill. Lecturers must understand their role in the development of critical thinking and problem-solving skills.

Lecturers must serve as facilitators to encourage conversation and encourage students to think freely, as well as to assist students understand that critical thinking does not always lead to the perfect solution, but rather teaches them how to respond appropriately to differing judgments and ideas (Henderson-Hurley & Hurley, 2013).

To summarize, soft skill development is usually assumed to be a natural process, with the capacity to be passed on and to develop knowledge and transformative capabilities in accordance with local obligations. The acquisition of soft skills by lecturers might affect their teaching quality and student accomplishment in order to handle the problems of globalization and societal transition (Calogiannakis et al., 2014).

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Part 2
International Education Issues

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Religion as an External Determinant of the Education Systems of the BRICS Member Countries: A Comparative Study

Abstract

Various internal and external determinants influence an education system. External determinants include language, demographics, geography, technology, politics, and financial and economic trends. Religion is also one of these external determinants that can influence an education system, as well as the education systems of the. The BRICS member countries consist of Brazil, Russia, India, China, and South Africa. The BRICS member countries are one of the most organized and supportive international cooperation organizations that currently exist.

Religion is considered a controversial and sensitive topic. This research aimed to determine how religion as an external determinant influences the education systems of the BRICS member countries. The study focused on the differences and similarities that can be identified based on religion as an external determinant of the various education systems in the BRICS member countries. The BRICS member countries were deliberately chosen for this study because each member state is considered a 'n secular country in terms of religion, yet each member state treats religion differently in their country. The comparative method was used during this study to identify the best practices from the BRICS member countries. The interpretive research paradigm was used during this study using the qualitative research approach. The document analysis was used during the study to analyse the content of policies, legislation, articles, and government publications using content analysis to be able to identify themes to be able to perform the comparison between the different education systems of the BRICS member countries.

The findings from this study are as follows: Religion as an external determinant of an education system does have a significant influence on the education systems of the various BRICS member countries. It is very important to observe and describe these findings from the context of the various member states.

Keywords: BRICS organization, determinants, religion, education, education systems, values and norms, Comparative Education

Introduction

Religion and education are considered important aspects of human society (Hungerman, 2013, p. 52). Religion has a significant impact on the outcomes of individuals' lives, for example, more generosity, a lower level of risky behaviour and these individuals have better health. In this study, the focus was specifically on the external determinant, namely religion and its influence on the education systems of each of the member states of the BRICS organization respectively. BRICS is an acronym for an organization of five growing national economies, namely Brazil, Russia, India, China, and South Africa. De Beer (2017, p. 1) emphasizes that the BRICS member countries have a co-operation agreement in various areas, including finance, health services and education. an Important area where the BRICS member countries work together in education. BRICS member countries still face several challenges in providing quality education even though the BRICS organization has put development strategies in place for education. One of the possible reasons for the mentioned challenges may be the different religions practiced in each of the BRICS member countries. Research results published by the Pew Research Centre (2016, p. 116) accentuate those various religions showed an impact on the establishment of schools, for example, Christian monks built libraries that helped with Latin, Greek and preserve Arabic writings and thus universities developed. In India, members of the Buddhist and Hindu monasteries were considered as the most educated persons in the country. In 2012, a study was launched by Wolhuter to determine the impact of religion on the South African education system by analysing ten countries' handling of religion in education. The following nine countries and one European region were used in the study by Wolhuter (2012) namely the United States of America, Western Europe, Armenia, Israel, Iran, Malaysia, Japan, Tanzania, South Africa, and Brazil. Baker (2019, pp. 42-43) indicated that religion cannot be left out in the education system, as religion has a significant influence on various parts of the education curriculum, even though there was a great cultural impact of the education revolution in the world. Because the BRICS member countries have a mutual co-operation agreement, a comparative study was needed to examine the different views of the different countries to identify possible best practices that can be applied by each of the five mentioned member countries within their respective education systems.

Theoretical conceptual framework

BRICS organization

The BRICS organization consists of five member countries, namely Brazil, Russia, India, China, and South Africa (De Beer, 2017, p. 1). The reason for the formation of this organization is, among other things, the cooperation about education and economy, in developing countries.

Determinants

Steyn et al. (2017, p. 23) describe determinants (contextual factors) as the factors that have a direct impact on the nature and functioning of a particular education system. The factors are divided into two categories, namely internal

(educational, historical, and reciprocal nature) and external factors (demographics, climate and geography, economics and science, politics, legislation, philosophy and language). This study focused on religion as an external determinant. According to Steyn et al. (2017, p. 10), the internal determinants are the forces and factors that are within a particular education system and the forces and factors that determine the current situation of the education system, while external determinants are the forces and factors that come from outside the education system that influences the education system.

Education

Education is defined as the deliberate, planned action whereby the educators enable the learners to acquire the desired competencies so that the learners can live out their calling in all facets of their lives (Steyn et al., 2017, p. 11).

Education systems

An education system can be defined as a framework or structure to effectively provide for the educational needs of a particular target group (Steyn et al., 2017, p. 15). Steyn and Wolhuter (2014, p. 56) define an education system as the structure where education is presented in an effective way to satisfy the needs of a group of people in a specific environment. In this study, the national education systems of the BRICS member countries were used to determine how religion as an external determinant influences the education systems.

Religion

The theory of religion is classified into two categories namely substantive and functional theory. The substantive theory focuses on the content and meaning that religion holds for man. The substantive theory emphasizes that people live out faith because their beliefs make sense if they retain values (Pals, 2006, p. 13). Edward Tylor and James Frazer are considered the founders of this theory of religion. The said scientists believed that religion does not consist of any supernatural revelation or miraculous events but can only be accepted from natural explanations and theories. Tylor and Frazer further believed that religion could be explained by examining how religion began so that religion could be perceived by its simplest form (Pals, 2006, p. 44).

Research aims and objectives

The primary research objectives of this study was to describe the nature of religion as an external determinant in the education systems of the BRICS member countries. The secondary research objectives were as follows. Firstly, to determine and analyse the differences regarding religion as an external determinant of the education systems of the BRICS member countries. The second objective was to examine and determine the differences regarding religion as an external determinant of the education systems of the BRICS member countries. Lastly, possible best practices regarding religion in the education systems of the BRICS member countries were identified. These best practices can then be applied by BRICS members states.

Research design and method

Nieuwenhuis (2018, p. 52) explains a paradigm as a set of beliefs or assumptions about fundamental aspects of reality that give rise to a specific worldview. This scholar further emphasizes that a paradigm deals with the basic assumptions based on religion. The qualitative research approach was used in the study. Nieuwenhuis (2018, p. 52) states that qualitative research involves an open, flexible method without strict guidelines. Qualitative research deals with the in-depth investigation of a set phenomenon.

Sampling

In this research, non-probability sampling was used. The purposive sampling in the non-probability sampling sphere is ideal for this study because the BRICS member countries are a supranational grouping that was deliberately selected for this study. Relevant documents on religion in the BRICS members states and its effect on education were sourced.

Data collection

Data were analysed and generated by analysing different documents along with relevant literature. Legislation and policy documents regarding religion of all five BRICS member countries were the emphasis for data collection in this research.

Data analysis

Document analysis is described as an appropriate method in comparative studies and for that reason, the document analysis was used in this study. According to Bowen (2009) and Dreyer (2016), the research questions in a study can be answered by studying the relevant documents and then interpreting them to gain the meaning and knowledge of the study.

Findings

The main reason for this study was to conduct a study that is comparative to determine the nature of religion as an external determinant of the BRICS member countries. Each member state of the BRICS organization's religious composition is unique and diverse and therefore significant differences and similarities have been found in the education systems of the BRICS member states.

Differences and similarities regarding the freedom of religion in the BRICS member countries

Freedom of religion in BRICS member states is clearly defined according to each member state's Constitution and therefore every citizen has the right to this freedom. In practice, according to the literature, the citizens of certain countries, unfortunately, do not always have this right to freedom. Citizens may not convert to any other religion in certain parts of India. Of all the five member states, China's religious activities are controlled and restricted most and even most of all the countries in the world. Russia and India are also struggling with religious

restrictions by the state. South Africa and Brazil compared to Russia, India and China have significant and even less religious restrictions.

Minority groups regarding religion are experiencing significant opposition in Brazil, Russia, India, and China. Although Russia guarantees freedom of religion for all citizens, the minority groups are disadvantaged and even restricted in religious activities. Minority groups in Brazil, for example, the Afro-Brazilian groups do experience opposition to their religion. China finds itself in a unique situation as there are 55 minority groups in China. This situation poses potential problems for the Chinese government as all the ethnic groups' freedom of religion must be taken into account. South Africa did experience religious restraint during the COVID 19 pandemic in 2020, but religious restraint, in general, is relatively rare.

Differences and similarities regarding the religious composition in the BRICS member countries

All five BRICS member states are considered multi-religious countries. Each type of religion has its challenges, as each religion has its rituals and views, and all five BRICS member states must take these rituals and views into account because of their Constitution. Only Russia's and India's Constitution clearly states that these two countries do not give one religion preference over the other (secular in nature). In India, the Hindu religion is mainly practiced. Most of the Chinese population consider themselves atheists but Taoism also plays an important role in Chinese society. In South Africa, Russia, and Brazil the various forms of the Christian religion are most practiced in these countries (Christianity, Orthodox Catholic and Roman Catholic). Although all five BRICS member states are considered multi-religious countries, there is one type of religion that is preferred in each country namely Roman Catholic (Brazil), Orthodox Catholic (Russia), Hinduism (India), Atheism (China) and Christianity (South Africa). From the latter statement it can be deduced that even though the five BRICS member countries are regarded as multi-religious countries, the majority religion does have a greater impact (especially in schools) compared to that of minority religions.

Differences and similarities regarding religion as a curricular activity in the education systems of the BRICS member countries

Religion is dealt with significantly differently in the education systems of the BRICS member states. In the Indian and Chinese schools, no religious activities are allowed according to the respective constitutions, while any religious activities may take place in the Brazilian, Russian and South African schools, provided that the activities comply with various guidelines. Essentially, any religious activity is offered only in primary schools in Brazil, provided attendance is voluntary. Religion in the Brazilian schools is influenced by the Roman Catholic religion and this event could be detrimental to the minority groups in Brazil as not all religions' views are taken into account. According to Russian law, learners in Russia have the free choice to choose the religious module in which he or she wants to be taught. In Russian schools, the latter legislation is not always implemented correctly, as the school's resources determine which module the learners should take. The latter handling of religion causes unhappiness among the learners and parents as they do not have the free choice about which religious module they want to be taught.

Chinese law clearly states that no religious activity may take place in public schools, yet the ruling party of China wants to establish atheist principles in their learners in schools. China has the most ethnic groups compared to the other BRICS member countries. According to legislation and policies, minority ethnic groups derive several advantages over schools. The ethnic groups pose several challenges for the government of China as all the ethnic groups' views in their education systems have to be taken into account. Various documents, including the South African Schools Act number 76 of 1996, the CAPS (2011) and education policies of the various provinces, provide clear guidelines on how religion may be dealt with in the South African schools. In South Africa, Religious Studies is offered as an elective to provide learners with the necessary knowledge of different types of religions worldwide. All learners in South Africa are exposed to the concept of religion through a subject namely Life Orientation. Teachers in South Africa have the challenge of respecting all kinds of religions and not preaching their views on religion. This challenge of respecting all religions can lead to conflict in schools, as learners may feel discriminated against if one type of religion is singled out during a hall opening. The Indian government is experiencing opposition from the minority groups regarding religion in schools as certain religions enjoy preference about the compilation of academic textbooks. This preferential treatment of religion is contrary to the Indian constitution, as no religion may be singled out or discriminated against. The preference given to a particular religion in textbooks may result in a possible negative effect on the education system of India.

Differences and similarities regarding the legal framework of religion in the education systems of the BRICS member countries

Regarding religious policy, there is a clear distinction between the five BRICS member countries. In China and India, there is no official religious policy in their education system as no religious activities may take place in public schools. Only education laws in Brazil and Russia stipulate those religious activities may take place in schools, but no official religious policies are applied in the education systems of the latter two countries. Although India should not experience problems regarding religion in its schools, there are still problems. The South African constitution provides clear guidelines that religious activities may take place in public schools. As the South African schools allow religious activities, various problems arise in the education system. The governing bodies of schools in South Africa are confronted with challenges regarding religion, as they are responsible for the religious ethos of the school.

Differences and similarities regarding the influence of society on religion in the education systems of the BRICS member countries

Religion has a significant impact on the education systems of all five BRICS member countries. Religion in Brazil among the minority groups causes violence because they are discriminated against. Currently, there is a significant increase in discussions and contradictions regarding the constitutional inclusion of religion in schools and the controversial inclusion of gender and sexual issues in the standards and policies in Brazilian schools. In Russia, the four traditional religions are singled out. Minority groups regarding religion that are not part of the four traditional

religions are strictly controlled by the Russian government. This handling of religion is causing unhappiness among the people of Russia. The Islam religion which is considered by Russia to be one of its religions is restricted in schools as Muslim traditional clothing is banned in schools. The Chinese government finds itself in a unique situation as China has 55 minority groups and all the groups must have access to education. The majority religion in China is Atheism which is subtly made visible in government by schools by teaching some of the principles of Marxism-Leninism-Maoism which is contrary to the Chinese Constitution that no religion may take place in public schools. This action can cause potential conflict among society. South Africa is currently experiencing a morality crisis due to religion. About 60% of the total population of South Africa indicated that they attend some religious activity weekly. From these statistics, likely, the moral behaviour of South Africans is strongly influenced by the attendance of religious activities. From the above information, it can be deduced that teachers in South African schools experience challenges concerning moral values. Because only 60% of the population attends a form of religious activity every week, it is a difficult task for the teachers to guide the learners on the right path due to the close connection between religion and human moral values. In India, the population is experiencing challenges regarding different types of religions. The conflict has arisen over the years between the Hindu and Islamic religions. This conflict is proof that the Constitution of India is not made into practice. All religions in India have the right to freedom but the legislation is a big challenge for the Indian government as the people do not respect all the different types of religions. In line with the latter statement, more people in India are being killed due to differences in religions. The conflict is of great concern to the Indian government. Along with the conflict, India is facing major challenges regarding human development status because parents do not want to place their children in a modern education system. As parents in India do not agree with the current education systems in terms of religious principles, the action causes a vicious cycle that causes learners to show low literacy levels which means that they cannot get educated. These learners cannot escape from their current situation which has an infinite negative cycle for the learners.

Conclusion

The findings from this study are as follows: Religion as an external determinant of an education system does have a significant influence on the education systems of the various BRICS member countries. It is very important to observe and describe these findings from the context of the various member states. Best practices have been proposed to try to improve the influence of religion as an external determinant on the education systems of the BRICS member countries, but it is not part of this article.

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The Structure for Teaching as a Component of the Education Systems of South Africa and India: A Comparative Study

Abstract

This research focused on the structure for teaching as a component of the education systems of South Africa and India. India and South Africa form part of the BRICS grouping, and BRICS have set out certain development goals about quality education. This qualitative interpretive study utilised relevant documents from India and South Africa that focused on the structure of teaching. The relevant documents were analysed by employing content analysis. The structure for teaching in the national education system organises and formulates the framework for education in the applicable countries. The study aimed to identify differences and similarities regarding the following elements of the structure for teaching. The elements foci were educational levels and the medium of instruction. One of the aims was to enhance the structure for teaching and learning in the BRICS countries. This research forms part of a larger BRICS project that compares the four components of the education systems and its elements as well as the internal and external determinates of the BRICS member states. It will contribute to a BRICS Education Encyclopaedia.

Keywords: structure for teaching, education system, component, comparative study

Introduction

Education plays a very important part in shaping the lives of people and assisting them with the challenges ahead of them. Education can become effective if there is a structure to which it should adhere. This study investigated the influence the educational structure has on South Africa and India's education systems. Children in the elementary group are entitled to receive free and compulsory education as highlighted in the right of Children to Free and Compulsory Act of 2009. Anderson and Lightfoot (2019, p. 1) indicate that India has the largest school education system in the world. Each year India has more than 260 million enrolments in their 15-million schools. They have over 8.7 million teachers in primary and secondary schools. Furthermore, Anderson and Lightfoot (2019, p. 1) stated that India gained independence from Britain in 1947 and the Education Department operated under the Ministry of Human Resource Department (MHRD). The Department of Education aimed to see an increase in quality education and in 1968 they had their first National Policy on Education. India's economic growth placed a limit on the expense of the education sector but towards the end of the 20th century huge progress was made. In 2000 India committed to the Millennium Development Goals and ever since great progress was administered within primary education. The government or the private sector owns schools and educational institutions in India.

Gumede and Biyase (2016, p. 69) indicate that South Africa's education sphere has changed drastically since apartheid was abolished in 1994. Duvenhage (cited in De Wet & Wolhuter, 2009, p. 359) stated the transformation in education played a crucial role in the transformation of the South African community. Msila (2007, p. 149) stated that the transformation from apartheid education to post-apartheid education did not come without any obstacles. After OBE was reviewed in 2004 the Revised National Curriculum Statement (RNCS) was introduced, providing a foundation for the transformation of the curriculum in South Africa. The RNCS was against how education, during apartheid, brought separation and inequality but rather the RNCS steered toward a system that embraced democracy from which teachers and learners could benefit.

Research questions

What was the nature of the structure for teaching as a component of the education systems of South Africa and India with the focus on the medium of instruction and educational levels? The following secondary questions contributed towards answering the above primary question:

- What were the similarities regarding the nature of the structure for teaching as a component of the education systems of South Africa and India with the focus on the medium of instruction and educational levels?
- What were the differences regarding the nature of the structure for teaching as a component of the education systems of South Africa and India with the focus on the medium of instruction and educational levels?

Deming's theory

The theoretical framework that guided this study was Deming's theory of profound knowledge, which is based on four components (Evans, 1996). This theory can be applied to an organization that wishes to have a more effective system in place that will at the end of the day provide quality results. Every component involved in that system or organisation will feel like they have something positive to contribute and that working together as a team is not a pain but rather a pleasure.

Education system

According to De Beer, Vos and Niemczyk (2022, p. 11), the education system is "the structure or framework for effective education to provide in the real education needs of the target group". In other words, the education system is a structured guide that helps to achieve quality education by focusing on the needs of those involved. The authors state that an education system is made up of the Education System Policy, Education System Administration, Structure of Teaching, and Support Services. Stone (1981) believed that an education system is regarded as a connecting structure that consists of the state, the different households, the different teacher structures, and educational organisations consisting of their authority in the lane they have to function.

Components of education system

The various types of educational systems are distinguished by a common structure that defines them as educational systems. The education system is made up of several parts, referred to as components, and each component is made up of various sub-divisions, referred to as elements of an education system. The components of the education system consist of policy, administration, support services and the structure of teaching. The latter applied to this study (De Beer, Vos & Niemczyk, 2022, p. 11).

The education system policy

The education system policy is defined as a formal statement in which target groups will be served according to their educational demands. The education system policy is legally binding, and it provides a framework in which decisions should be made in terms of the provision of facilities, what services should be delivered and how activities should be done. The education system policy makes it possible for the education system administration, the structure of teaching and the support services to function effectively to provide in the educational demands of those involved (De Beer, Vos & Niemczyk, 2022, p. 58).

The education system administration

The education system administration includes the control of education, how the education system is organised, and the management of the education system (De Beer, Vos & Niemczyk, 2022, p. 79).

Support services

Support services are provided to improve the quality of success of education. These services are conducted by specialists in their specific field of work. Teachers and learners benefit from support services to ensure that they give their best and contribute to an effective and quality education system (De Beer, Vos & Niemczyk, 2022, p. 138).

Structure for teaching

Include all the different educational institutions and the different levels of education. Structure for teaching aims at effectively providing a learning and teaching environment that will serve the different needs, abilities, strengths, and weaknesses of individuals as well as providing accordingly to the requests that are made by the parties involved and the community (De Beer, Vos & Niemczyk, 2022, p. 100).

The components of the educational structure can be identified as follows (De Beer, Vos & Niemczyk, 2022, p. 121):

- Educational institutions, which comprises a description of all the numerous educational institutions on various educational levels, as well as their goals, nature, and operation.

- Curricula and differentiation, which describe the many educational programs offered at various educational levels and various educational institutions, as well as the various types of differentiation offered.
- Educators as an element related to the gender, age, credentials, and salary of educators in educational systems, as well as training possibilities for educators. The learners as an element refer to the age, gender, admission requirements, and other general requirements expected from learners.
- The educational spaces and physical facilities report focus on the quantitative and qualitative state of the educational spaces and facilities in the school system.
- The education level, such as pre-primary, primary, secondary, and tertiary.
- The medium of instruction is used to organize the languages that are used in teaching and learning.

For this research, we only focused on the education level and the medium of instruction.

Comparative study

According to Khakpour (2012, p. 20), comparative studies can be defined as "when individuals or teams' study particular topics or phenomena in the formation of two or more countries". The author further stated that similarities and differences between two subjects may also be explained within a comparative study. Furthermore, Bukhari (2011, p. 4) maintained that the purpose of comparative studies is "to arrive at some conclusions concerning past occurrences".

Research design and methodology

Akhtar (2016, p. 68) describes research design as the structure of the research. It is the "glue" that holds all the elements in a research project together. The author further stated that a research design is vital seeing that it contributes to the progress of numerous research procedures. Nieuwenhuis (2020, p. 59) highlights that "all qualitative research is naturalistic, it focuses on natural settings when interactions occur, in other words, viewing social life in terms of processes that occur rather than in static terms". Qualitative researchers are keen to find the answers as to how humans organise themselves and the context they find themselves in.

Similarities regarding the nature of the structure for teaching of the education systems of South Africa and India with the focus on levels and medium of instruction

The educational levels as a component of the structure for teaching

South Africa

According to Steyn and Wolhuter (2014, p. 95) the school pattern in South Africa is as follows:

- Pre-school (ages 4-5);
- Foundation phase, grades 1-3 (ages 7-9);

- Intermediate, grades 4-6 (ages 10-12);
- Senior phase, grades 7-9 (ages 13-15);
- Further education and training, grades 10-12 (ages 16-18).

India

According to Anderson and Lightfoot (2019, p. 15) India's education structure has the following levels:

- Primary education – five grades (ages 6-10);
- Upper primary education – also referred to as middle school, lasts 3 years, grades 6-8 (ages 11-14);
- Lower secondary education – grades 9-10 (ages 15-16), non-compulsory according to Right to Education Act 2009;
- Higher secondary education – grades 11-12 (ages 17-18).

The National Education Policy of India (NEP 2020) lays forth the country's educational vision. The 1986 National Policy on Education has been replaced with the new policy. In both rural and urban India, the program provides a comprehensive framework for basic through higher education, as well as vocational training. By 2021, the strategy intends to completely alter India's educational sector. The 10+2 structure is being replaced with the 5+3+3+4 form in NEP 2020. 5+3+3+4 refers to the first five years of a child's life, whether they are in an anganwadi, a pre-school, or a balvatika. Then, from grades 3 through 5, there are three years of preparatory learning. This is followed by a three-year intermediate stage and then a four-year secondary stage till grade 12 or 18 years of age (Kulkarni, 2020).

Similarities

Both South Africa and India have different levels to their education system. Both countries end grade 12 with the proposed 18 years of age. The South African and Indian education systems have the same structure that is connected to age in their educational levels.

Differences

The South African school system levels are 4+3+3+3 (Foundation phase, grades R-3; Intermediate phase, grades 4-6; Senior phase, grades 7-9; Further education and training, grades 10-12). India's levels were 5+3+2+2, but the NEP of India changed in 2020 to 5+3+3+4 (Foundation phase, pre-kindergarten to grade 2; Preparatory stage, grades 3-5; Middle stage, grades 6-8; and Secondary stage, grades 9-12). Thus, the Indian structure for teaching uses one more year during the Foundation phase, compared to the South African structure. The assumption is that it is important to lay a solid foundation through starting at an earlier age, for a learner to be ready for the next phase. The final stage of the school structure in India is one year more than the SA structure.

The medium of instruction as a component of the structure for teaching

South Africa

There are 11 official languages in South Africa. All of these home languages are taught in the first year of school. Before 2009, schools serving non-English speakers

were required to teach English as a subject exclusively from grade 3 forward, and grade 4 onwards, all courses were taught in English (except in Afrikaans language schools). In terms of the South African Schools Act 84 of 1996 "The governing body of a public school may determine the language policy subject to the Constitution, this Act and any provincial law". Since 2009, all schools have taught English as a subject beginning in grade 1 and all subjects beginning in grade 4. The exception is Afrikaans language schools, where all topics (excluding foreign languages) are taught in Afrikaans (Statssa, 2017).

India

Rizvi (2016, p. 224) states that

> *Three language formulas were enunciated in the National Policy Resolution (1968). The formula of language learning was formulated by the Union Education Ministry of Government of India in consultation with states.*

According to Anderson and Lightfoot (2019, p. 26)

> *The government developed a three-language formula for schools. This formula envisaged that students should study two languages and English. The most common languages in India are Hindi and the state language. Both the Indian Constitution and the Right to Education Act assert that the medium of instruction shall, as far as practicable, be the child's mother tongue.*

Anderson and Lightfoot (2019, p. 27) further asserts that

> *While some states have introduced English Medium Instruction across the board others have tried to resist the early transition to English Medium.*

The National Education Policy 2020 'emphasised' the use of mother tongue or local language as the medium of teaching until grade 5, while also recommended that it be continued until grade 8 and beyond. It also stipulates that the pupils will not be forced to learn a language. The NEP's language policy is intended to be a broad guideline and advisory in nature, with states, institutions, and schools deciding how to implement it (Chopra, 2020).

Similarities

The importance of learners being taught in their mother tongue when they begin schooling is evident in both country's teaching structures. The second similarity is that English features in both the Indian and South African teaching structures. The importance of English as an universal language is realised.

Differences

In South Africa the school has a governing body that decides on the language policy for a school that is in line with other compulsory legislation. In terms of the South African Schools Act 84 of 1996 members who serve on the governing body comprised of "Parents of learners at the school; educators at the school; members of staff at the school; and learners in the eighth grade or higher at the school". Whereas in India the state, institutions, and schools get to make the decision based on language policy for schools. The second difference is that learners in the Indian school system will not be forced to learn a language. The third difference is that English is taught as a subject in the South African school structure from grade 1

onwards, while schools in India have an option, depending on the decision made by state, institutions and school.

Findings

The different educational structures in the South Africa and Indian education system, make it possible for institutions to cater to the different educational levels. In both countries, there is a law in place that promotes free and compulsory school. Learners who are between the given ages that fall under compulsory education should be attending school until the cut-off age for compulsory school. In terms of the legislation in South Africa, the medium of instruction is English in most South African schools, where 65% of the school system chose to learn through the medium of English. However, in India, the education system does not regard English as their medium of instruction but rather their mother tongue languages and Hindi. According to UNICEF (2016, p. 3) "It is important to maintain an appropriate role for English because the global dominance is English". These compressed findings will be added to the BRICS Education System Encyclopedia.

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Thoughts on the Impending Third Epoch of School Education Policy in South Africa

Abstract

South Africa must embark upon the third epoch of education policy after the failures of the first two epochs: the 1953-1994 ("apartheid") era and the 1994-2021 era (the dawn of democracy and the dismantling of apartheid structures). There were not enough education opportunities to guide all the children of the country to maturity and acceptance of their civilian responsibilities. This paper examines the reasons why the education policies of the first two epochs failed and contributed to a poor, unequal and ineffective school education system. The paper also explores the challenges that the education system needs to confront to create a new education system that will support the attainment of the hitherto unfulfilled expectations and dreams that its citizens carried into the democratic era. The education policy of the third epoch must address critical issues to chart the way to an effective education system. There is a need to reorganize (reset) the education system in the wake of the COVID-19 pandemic. A streamlined curriculum needs to focus on the essential skills and knowledge the country needs. The system can no longer ignore the need for the adequate provision of vocational and technical education to alleviate the sharply rising unemployment rate of young people and support the growth of the economy. Quality education policy must function despite the lack of funds for the provision of appropriate and functional infrastructure and competent human resources.

Keywords: third epoch, policy failure, challenges, system reset, vocational and technical education, infrastructure, competent human resources

Introduction

The title of this paper may be misleading, but it does not suggest that there was no education policy in South Africa before 1953. It points to the fact that it was only when the Bantu Education Act 47 of 1953 (Union of South Africa, 1953), enacted by the Queen of Great Britain (and then also Queen of South Africa) and the Union's Senate and House of Assembly, was implemented on 1 January 1954 that South Africa had school education policy provisions applying to all its people.

Functional policy (rooted in legislation) is an essential cog in the governance, leadership and management of effective public schooling. Schooling is probably the most important function of any government without which state systems are likely to collapse (Thro, 2006, p. 65). A discussion of aspects of past, present and future education policy is therefore appropriate because a radical revision of policy seems unavoidable.

Reasons why the education policies of the first two epochs failed

1953-1994

Although South Africa was the first African country to develop policy and legislation for its entire Bantu (Black African) population, the entire system departed from a white supremacist stance which was flawed as it viewed other population groups (Black Africans, Coloureds, and Indians) as inferior to whites. A much smaller amount of money per capita was spent on learners and educators of groups other than whites. Inevitably the quality of education to which the different population groups had access differed greatly and inequality characterized the system.

The apartheid ("separate development") policy of the ruling party led to many different entities becoming responsible for education policy and legislation development, promulgation and implementation. Towards the end of the apartheid era there were fifteen distinct racially divided education departments in South Africa.

National policy coherence, implementation and accountability were well-nigh impossible. In addition, non-White learners finished school without a reasonable prospect of being employed mainly as a result of "job reservations" for whites. They were mainly left with manual and unskilled labor opportunities. Non-Whites only had access to a small number of professions such as teaching, nursing, medicine and theology.

The educational inequality, discrimination in the broader society and the oppression by the government led to popular uprisings, resistance, insubordination, protests and revolts by educators, learners, teacher unions and banned political and other organizations. The Soweto uprisings of 1976 during which a large number of learners were shot dead by police for acts of insurrection are probably the best known of all these occurrences.

There is no gainsaying that education policy and practice were not successful in the apartheid era. This was exacerbated by the fact that school education was not compulsory for learners from all population groups.

1994-2021

1994 ushered in the constitutional democracy era and the pursuit of the democratic values articulated in S1(a-d) of the Constitution of 1996 (RSA, 1996) namely human dignity, the achievement of equality, the advancement of human rights and freedoms, non-racialism and non-sexism. It also ushered in adherence to the rule of law and a charter of human rights entrenched in Chapter 2 of the Constitution of 1996 (RSA, 1996).

These values and principles were meant to facilitate the development of a multiracial country where everybody would have equal opportunities to develop their potential and enjoy a dignified life. The dismantling of the legacy of apartheid was imperative for the democratically elected new government. Education policy and practice reflected the pursuit of both objectives.

Beckmann (2021, pp. 758-759) cites published research indicating that South Africa spends much more on education than its peers but has much worse outcomes. He refers to The World Economic Forum's (WEF) (2013) evaluation of South Africa's education as the third worst in the world.

Breier (2009, pp. 1-21) reports on the findings of a Human Sciences Research Council (HSRC) study on skills shortages in South Africa. The study focused on

skills shortages in 11 professions including education, social work, engineering, medicine and artisanship. She comments among others that (p. 1):

- "South Africa's skills shortages are widely regarded as key factors preventing the achievement of the country's" growth targets.
- Many "of the high-level skill shortages in this country are blamed on the education system...".
- The "massive shortage of artisans is largely attributed to the decline of the apprentice system" in "the further education and training (FET) sector …".
- There has been "… a loss of senior capacity, largely as a result of affirmative action" and "many experienced white professionals" evacuating their posts.
- There is "still a very small pool of matriculants who have the necessary grades and subjects to access programmes like engineering, medicine and accounting" and there are also "particularly few African and coloured students in this pool" which makes employment equity difficult to achieve.

All of the skills shortages above point to the absence of sound education policy and practice to underpin the country's pursuit of an equitable, free and economically sustainable and prosperous country. However, the DBE has started to implement a curriculum model to route more learners to technical and vocational education, possibly alleviating the severe skills and artisan shortages in the country.

Jansen (2002, p. 1) points out that developing countries are replete with narratives that attribute policy failure to "the lack of resources, the inadequacy of teacher training, the weak design of implementation strategy, and the problems of policy coherence". In his opinion, the "making of education policy in South Africa is best described as a struggle for the achievement of a broad political symbolism that would mark the shift from apartheid to post-apartheid society" instead of "policymaking connected to any serious intention to change the practice of education 'on the ground'" (Jansen, 2002, p. 2).

Jansen's essay identifies several important problems regarding policy making and practice in South Africa in the second epoch:

- "There are few countries in postcolonial Africa that has [sic] drawn more heavily on international consultants in its first few years of 'independence'" (p. 7).
- Education "policy borrowing" signifies that "elected officials and politicians are more likely to be interested in a borrowed policy's political symbolism than its details" (p. 7). Extensive use was made of overseas experts who oftentimes not only took part in deliberations but also drafted the policy(ies) in question, often resulting in [contextually unintelligent] policies which were more suited to their overseas origins than to South Africa [Insertion by the author].
- Jansen (2022, p. 9) questions "the heavy attention paid to formal participation in the policy process irrespective of its final outcomes". He states, quite correctly in my opinion, that "this faith in process itself … granted legitimacy to policy, irrespective of the final outcome". There was no guarantee that participants' views would prevail or even be considered.

It is also trite knowledge among policy analysts that policy making and implementation did not meet criteria for success such as:

- Sufficient, experienced and competent human resources and infrastructure to implement practicable policy. This is partially due to the legacy of apartheid but also to practices of the ruling party such as 'cadre deployment', a practice which seems to transgress the provisions of Section 195 of the Constitution of 1996) (RSA, 1996). People are rewarded with posts purely on the grounds of their loyalty to a political organization (the African National Congress, the ANC).
- Clear implementation and communication strategies including in-service training opportunities for implementers.
- Policy stability – there has been a surfeit of policies and policy amendments that have led to 'policy fatigue' among practitioners. The national curriculum has been amended at least 4 times between 1996 and 2011 (Gumede & Biyase, 2016, pp. 69-70). A normal life cycle for a curriculum would be closer to 12 years.
- Clear allocation to, and the acceptance of different responsibilities by stakeholders. In this regard, the ability of teacher unions to completely derail policies (and de facto usurping the decision-making functions of government) is an enormous problem in South Africa and indicates a misunderstanding of the roles of unions and governments.
- Quality drafting by qualified policy drafters practising a profession like legal draftsmen do. On 2 February the government (Department of Home Affairs, 2022) added policy and planning managers who can plan, develop, organize, direct, control and coordinate policy advice and strategic planning to the list of critical skills shortages in connection with applications for critical work skills visas and permanent residence permits. Sensible use of this opportunity to obtain the services of policy drafting experts could greatly assist education officials.

One has to conclude that the quality of education policy and practice in South Africa leaves much to be desired. Policy and practice need to be reset and revisited. The third epoch will face new and persistent challenges from the past.

Policy challenges of the third (after coronavirus) epoch

Following the ideas advanced by Schwab and Malleret (2020) in their authoritative publication written in their capacities as Founder and Executive Chairman of the WEF and Managing Partner of the Monthly Barometer respectively, I have chosen to refer to the third epoch as the after coronavirus epoch. I will explore the future of quality education policy as a non-negotiable prerequisite for a functional and effective new education system.

The consequences of COVID-19 for the education system have not been solved and must enjoy priority attention. The National Income Dynamics Study (NIDS)-Coronavirus Rapid Mobile Survey (CRAM) (known as NIDS-CRAM) carried out by Spaull and thirty-five colleagues surveyed various aspects of the impact of COVID-19 on society in 5 waves from 7 May 2020 to 11 May 2021. The fifth and latest NIDS-CRAM synthesis report (Spaull & Daniels et al., 2021) sheds light on several challenges for future education policy such as the following:

- Since the onset of COVID-19 up to May 2021 the number of learner drop-outs increased by 573 000 in a basic education system comprising approximately 13 million learners.
- Most primary school learners lost between 70% and 100% of the teaching and learning time they had in 2019. Making good these losses should be a priority in the after coronavirus era to prevent the virus from permanently destroying children's hopes to gain what they are entitled to receive from education. Some schools have already started their own initiatives to catch up on the education backlogs but there is still a dire need in 70% or more of public-school environments in this regard.
- Naidoo (2021), the CEO of the Youth Employment Service, refers to startling official data regarding unacceptable and rising youth unemployment figures. He states that "two out of every three young people (under 35 years) in South Africa are unemployed, and this rises to three out of four of the under-25s". He poses a question meriting intensive attention from policy makers: "If they cannot find employment or hope for themselves and their families, what does that foreshadow for the country's future?".
- Malnutrition and hunger are acute problems among many South Africans including school-going youth and three million children were affected by hunger despite the state's introduction of a National School Nutrition Programme (NSNP). Policy makers and implementing officials will have to address these problems so that children do not lack food security, experience "silent hunger" (where children have access to food but not to needed nutrients) and do not become stunted (short-for-age) because of exposure to silent hunger. 25% of children under the age of five are stunted and stunting leads to irreversible cognitive, physical and mental disabilities.

In addition to what Spaull and Daniels et al. (2021) indicate, education policy designers also need to study other countries' responses to the challenges of COVID-19 in education with a view to optimizing their own policies. In 2022, the OECD published a report (Vincent-Lancrin, Cobo Romaní & Reimers (Eds.), 2022) on how 44 diverse countries were able to achieve "education continuity" during the pandemic.

The lack of support for educators in their efforts to neutralize the effects of the many days of learning and teaching lost has also emerged as a concern. The state does not seem to have a coordinated support plan for schools, but some outside organizations and NGOs are supporting some schools.

Two more substantial problems have been highlighted in recent times: the quality of educators and the funding of education. Firstly, BusinessTech (2022a) reports that the 2030 Reading Panel found that Bachelor of Education students in their final year of their initial teacher education programmes scored only 54% on a primary school mathematics test. This exemplifies teachers' incompetence that cannot be tolerated. Secondly, De Lange and Slatter (2022) cite the Budget Justice Coalition's (BJC) statement that, although the government has declared education a priority, it spends increasingly less on basic education despite the increase in learner numbers. The education budget has shrunk from 14,8% of the consolidated budget of 2017-2018 to 13% in 2021-2022, making the pursuit of educational excellence almost impossible.

How do South Africa's education authorities plan to tackle the challenges of the third epoch?

The South African government's responses to the challenges have been described as vague, insipid, uninspiring, boring and dilly-dallying. The responses are essentially tedious repetitions of promises dating back 18 years. A fine example of such a response can be found in the Minister of Basic Education's address to a governmental lekgotla (think tank) on 28 January 2022 (BusinessTech, 2022b).

The Minister said among others that:

- Digital learning is required now, not in the future. The Department of Basic Education (DBE) has plans to give every teacher a laptop before the Minister's term of office ends in 2024. The DBE is also developing a new programme for online schooling and distance learning.
  (The plans are still in the planning phase and will require ample funding. Isolated private sector and state projects have seen some schools getting computers and new schools with all the necessary infrastructure built. The above government plans may only exist in the realm of dreams.)
- The DBE wants to strengthen the curriculum so that it will explicitly state the knowledge, skills and competencies learners need for the 21st century. The department plans to appoint a task team to effect all these changes.
  (The reference to the appointment of task teams is exasperating. Hopefully this task team will take cognizance of many experts' advocacy of a reduction of the number of subjects and curtailing curriculum content to facilitate catching up on lost teaching time and to focus on the skills the country needs urgently.)
- Lost teaching time needs to be made up through rotational timetables, updated attendance and enrolment tracking, extra classes and giving learners more homework.
  (Rotational timetables which halved the learner and teaching time for the majority of learners have now been discontinued and this has led to a crippling shortage of classroom spaces. A large number of unaffordable additional staff will be needed. It is not clear how extra homework can make up lost teaching time.)

Conclusion

Schwab and Malleret's (2020) comments on what the after coronavirus era might entail are worth repeating. Their outlines of a new era are only conjectures, but they believe that the world will become increasingly complex, be fast-changing (shortening the shelf life of policies will drastically) and be filled with many as-yet-unknown challenges. Decision-makers will have more information and analyses available than ever before but less time to make well-considered decisions. It is important to remember that there will also be many opportunities to restore and re-create education systems.

Expertly drafted policies to guide education in the uphill battles of the future are non-negotiable.

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Education Students' and Lecturers' Experiences of the Effectiveness of Physical Education Teacher Training in Distance Education Mode

Abstract

Distance education is a mode of teaching that enables students who are not able to enrol full-time at a university due to a shortage of time, physical access or financial abilities, to study in their own environment and at their own pace. Only one university in South Africa offers Physical Education as a comprehensive module in the distance education mode. The aim of this study was thus to investigate education students' and lecturers' positive and negative experiences of the effectiveness of Physical Education teacher training in distance education mode at a university in South Africa. Underpinned by Moore's Theory of Transactional Distance (TTD) (1983), data were collected by means of semi-structured, individual interviews with four lecturers and open-ended questionnaires with 17 students in a Physical Education distance education module. The five themes that emanated from the data analysis, were: interaction between students and lecturers; competence, passion and enthusiasm to teach Physical Education; obstacles with regard to Physical Education in distance learning; experiences with regard to practical training in Physical Education; and the content of the Physical Education program and students' perceptions of Physical Education. From the findings of positive and negative experiences of Physical Education in distance education mode, recommendations are made for Physical Education teacher training in distance education mode, for example, additional face-to-face contact opportunities, additional technological training, the enhanced use of student-interaction functions in learning management systems and sufficient management and administration systems at universities.

Keywords: Physical Education, distance education, teacher training, Theory of Transactional Distance

Introduction

During the last few decades, distance education has included various designs. These different designs include courses via mail, video recordings and television, although they have recently progressed to online courses. The White Paper on Education and Training (Department of Education (DoE), 1995) defines distance education as an approach that combines the principles of learner-centeredness, lifelong learning, the provision of flexible learning and the removal of barriers to access to learning. Learner-centeredness and flexible learning are also among the principles underlined by Moore's Theory of Transactional Distance (TTD) (Moore, 1983; 1989; 2013), a theory that has been applied in various studies involving distance education. The TTD postulates that *structure* (the composition and content of the course), *dialogue* (the interaction between learner-learner, learner-content and learner-instructor) and *autonomy* (the independence of the student in terms of their studies) can increase or decrease the psychological, cognitive and affective distance

between the student and lecturer (Moore, 2013). The "structure" and "dialogue" components of Moore's theory are further supported by requirements for the successful delivery of distance education, as set by the Policy for the Provision of Distance Education in South African Universities (Department of Higher Education and Training, 2014) which include that a quality learning environment must be developed with several support group discussions, practical sessions, media and private study classes.

Mphahlele and Makokotlela (2021) documented ways to abate the obstacles causing inadequate student engagement with regard to student commitment through the lens of TTD, and came to an assumption that there should be balance and flexibility between all the transactional outcomes among distance learning students, their teaching and learning programs, and the lecturers.

Mungai (2021) focused on students' opinions of course quality and instructor success in online learning from the viewpoint of Moore's TTD, and found that the students reported noteworthy, optimistic, and robust associations with course value and instructor success. The study further established that the main TTD dimensions (learner autonomy, course structure, and dialogue) were prognostic of course value and instructor success (Mungai, 2021).

Practical experience and learning can be further developed through a work-integrated learning (WIL) system (DoE, 1995). According to the White Paper on Education and Training (DoE, 1995), practical workplace experience and knowledge must be seen as an essential part of a qualification, whether it is presented in distance or contact mode. This aspect of practical learning experience also applies to the distance education of Physical Education - a practical component of the compulsory subject Life Orientation (LO) (Department of Basic Education (DBE), 2011). According to the Curriculum and Assessment Policy Statement (CAPS) document, the purpose of Physical Education is to develop physical competence, safety and knowledge of movements in learners (DBE, 2011). However, the training of Physical Education teachers also involves practical components such as the training in and acquisition of specific movement and sports skills and techniques, as well as practical class management and methodology strategies (DBE, 2011). The different subdivisions of Physical Education, namely: physical fitness, sports and games, and recreational movement activities including educational dance and educational gymnastics, each have their own challenges. While these aspects can be addressed in practical lectures in contact mode, they present challenges when it comes to the practical skills and strategies in which education students need to be trained over a distance. No study investigating the experiences of students in Physical Education teacher training programs in distance mode in South Africa, could be found.

This study therefore focused on the experiences of education students and lecturers regarding the effectiveness of Physical Education teacher training in distance mode, including the challenges, weaknesses and strengths of such a program. The participants' experiences of lectures, learning movement skills, completing, submitting and assessing assignments, online communication and examinations were included.

Methodology

Research design

In this study, a qualitative research design was used, with open-ended questionnaires and semi-structured interviews as data collection methods.

Setting

The North-West University (NWU) in Potchefstroom, South Africa, offers both Physical Education and Life Orientation as majors for students enrolled in a Bachelor of Education (B.Ed.) degree, in distance mode (NWU, 2022). The NWU's Unit for Distance Learning (UDL) has a designed curriculum to be completed in the minimum period of four years and a maximum of eight years (NWU, 2022). The *eFundi* learner management system assists students in these programs, providing an electronic platform within which all the support a student requires is accessible, from communicating with the lecturer and peers, to receiving and submitting assignments (NWU, 2022). Interactive whiteboard sessions (IWB), which are live contact sessions delivered by a lecturer in Potchefstroom and broadcast to learning support centres across South Africa, are also utilised. Student support further includes contact with the lecturer via e-mails and phone calls, as well as study material and study activities posted on the eFundi platform (NWU, 2022).

Participants

The participants consisted of third-year distance learning students (n = 17) who were studying for a B.Ed. degree, with Life Orientation as a major, in the Further Education and Teaching Phase (FET phase) at the NWU. Both the first and second semester modules in the third year of this major focus exclusively on Physical Education. Secondly, the lecturers (n = 4) who teach Physical Education modules in distance education mode at the NWU were also part of the study population. Purposeful sampling was thus applied, in other words when relevant selected participants are used according to predetermined criteria, determined by the research question (Nieuwenhuis, 2012).

Ethical considerations

Ethical approval was obtained from the Ethics Committee of the Faculty of Education (EDU-REC) (NWU-01643-19-A2) of the North-West University, as well as from the gatekeeping committee of the Registrar of the NWU (NWU-GK-2020029) because the research included NWU students.

Data collection

Data collection included semi-structured, individual interviews with four lecturers and open-ended questionnaires with 17 students in the Physical Education distance learning module.

Credibility and trustworthiness

To increase the credibility and trustworthiness of the data collection in this study, the interview schedules and questionnaires were evaluated by experts in the

field of Physical Education before the start of the study, and adjustments were made based on the recommendations of these experts. To increase the credibility of the data related to the interviews, the researcher further provided the transcribed data to the participants for confirmation, and the transcripts and recordings to an independent researcher who validated the transcripts.

Data analysis

The researcher collected and analysed the data by means of an inductive analysis process as recommended by Creswell (2013). The data were analysed by organising the responses from the questionnaires of the students and from the interviews of the lecturers according to identified patterns, coding, and the identification of themes and subthemes to be presented in the discussions following hereafter (Creswell, 2013).

Results

The five themes that emanated from the data analysis, were: (1) Interaction between students and lecturers; (2) Competence, passion and enthusiasm to teach Physical Education; (3) Obstacles concerning Physical Education in distance learning; (4) Experiences of the practical training in Physical Education; and (5) The influence of the content of the Physical Education program on participants' perceptions of Physical Education.

Interaction between students and lecturers

According to the participants, the lecturers' availability was exceptional. The students reported that they could get hold of the lecturers easily and quickly via e-mail or the WhatsApp application and the lecturers responded punctually with helpful guidance, as two student-participants put it:

> *The lecturer was easily reachable via e-mail. Responded very quickly, which I appreciated. There was never a fear when I wrote an e-mail, that I would not receive a reply.*
>
> *Contact was never a problem. If anything was unclear, a mail was sent and a reply was received not long thereafter.*

One of the lecturers also explained the value of personal, "caring" communication with students as follows:

> *… I communicate personally with everyone… and the students had the greatest appreciation for it…*

The students experienced the lecturers as professional, available and attentive, which contributed to the positive interaction between students and lecturers. Students' negative experiences included that there was no physical contact between the student and the lecturer, as touched on by two of the students:

> *… It is not always ideal or practical because no physical contact can be made with the person.*
>
> *There is no real interaction.*

Competence, passion and enthusiasm to teach Physical Education

From the responses of the student-participants, it appeared that the lecturers' passion for Physical Education motivated them to also teach the subject with enthusiasm. The majority of the students also indicated that their competence and confidence increased as they progressed with the module. Several student participants indicated that the positive influence of the Physical Education training on their self-confidence in presenting a thorough Physical Education lesson was accompanied by their improvement in subject knowledge. Some students stated:

> *… I am now highly confident, because I can now immediately apply my content knowledge and experiences from a classroom environment to this course and the later (sic) also…*
>
> *I am much more confident now. I know better how to use CAPS as starting point and to then prepare lessons that fit into that curriculum.*

All the lecturers reported that they were passionate about Physical Education, among other things because they felt that the holistic development of every human should include the cultivation of a lifelong desire for exercise. One lecturer stated:

> *… I love it, it's really just a joy and I want to motivate the students to move, not only for their own health, but also for social and all the facets of well-being.*

Three of the lecturers further pointed out that their love for Physical Education and sport contributed to the outstanding quality training they strove to offer to students. Two lecturers agreed that they lived out their subject knowledge and tried to convey it to the best of their ability to the distance students, as one lecturer summarised it:

> *… My lifelong love of sports has provided additional confidence when I offer Physical Education classes.*

Obstacles with regard to Physical Education in distance learning

The obstacles experienced by students and lecturers with regard to Physical Education in distance learning mode were, firstly, the students' background knowledge; secondly, the students' technological illiteracy and limited internet access; and thirdly, deficiencies in terms of the administration of assignments.

From both the questionnaires and interviews, it emerged that the students often did not have foundational knowledge of Physical Education and sport, as confirmed by two students:

> *My biggest obstacle was little knowledge about the subject but built up the knowledge over the course of the semester.*
>
> *Little experience with sports…*

According to the lecturers, distance-learning students are not always aware of the enormous role that technology plays in their studies. All the lecturers pointed out that students' lack of knowledge, skills and access with regard to the use of technology is an obstacle to Physical Education teacher training in distance mode, as one lecturer put it:

> *Unfortunately, not all students have the necessary technology and do not always understand how it works.*

The lecturers also all shared the feeling that the slow service delivery by the distance education management center with regard to the administration and submission of assignments, is a "headache of its own". The majority of the lecturers

mentioned that they did not always receive the assignments on the given submission dates, and that this caused problems with regard to their timely feedback. Another problem mentioned by the majority of lecturers was that problems have arisen with regard to the forwarding of assignments to lecturers and feedback to students as a result of assignments that have not been correctly recorded at the management center. One lecturer linked the problem to the large number of assignments received:

> *Failure to keep a thorough record at the management center of receiving and forwarding assignments can lead to confusion. The management center to which all assignments are sent must receive thorough training to handle the large number of assignments.*

Experiences with regard to practical training in Physical Education

The participants experienced the use of videos for the training of practical skills and concepts positively, although they also indicated disadvantages. Several students explained the positive contribution of videos to the development of their practical skills and understanding of movements:

> *I learned a lot more from the videos than I did from reading about how to coach or train others. It would be more useful if there were more videos with practical teaching for me to learn from. Especially as this is a "doing" subject rather than a "reading/studying" subject, it would be great if the delivery method used more videos to do as we watch, rather than only reading about doing.*
>
> *If a video is available, one can look at it a few times if unclear.*
>
> *In a normal class, certain things cannot be repeated a few times due to time constraints. I like to listen, then ponder over something and listen again… Distance also allows you to research more and therefore learn more.*

A few students even reported that they doubted themselves if they did not have an adequate video depicting the practical movements:

> *Not having a video or clear indication of what the lecturer wanted, because it left me constantly doubting myself, not knowing if what I was doing was correct.*

One negative aspect regarding the practical training reported by some students, was that they experienced the long interval between the submission of practical video assignments and feedback from lecturers, as negative. The time it takes for feedback from lecturers on students' performances of movements or practical lessons is a problem in online Physical Education, as the students only receive the feedback much later and cannot correct themselves immediately when they perform the movement. One lecturer explained the feedback problem as follows:

> *In a traditional classroom setting, a student's performance can be immediately assessed through questions and informal testing. With distance learning, a student has to wait for feedback until the instructor has reviewed their work and responded to it.*

However, a few students explained that they were aware that practical training would be more difficult in distance mode when they enrolled for the module, as explained by one student:

> *… anyone will be more comfortable having a one-on-one practical lesson with the lecturer, but we all as distance students were aware of these difficulties when choosing our subjects.*

The influence of the Physical Education program on participants' perception of Physical Education

The majority of the students experienced the content of the Physical Education course as positive because they found it interesting. Being conscious of the value of Physical Education for the holistic development of learners, also motivated students to perform well in the course. A student summarized her experience of the content of the training program as follows:

> *The module content was interesting, which made me want to learn more.*

According to several students, the training course positively influenced their view of the value of Physical Education in schools. One student even indicated that her view, which had long been that Physical Education is a waste of time, had changed:

> *After all these years of my knowledge of PE, I now have a total different perspective of PE in Life Orientation. I also thought that it was a waste of time in schools but now I know why it is compulsory.*

In another student's opinion, the principles of Physical Education are so valuable that teachers have to apply them in their own lives.

> *That it must be taken more seriously and integrated personally in to your life.*

Recommendations and policy implications

Deriving from the findings of positive and negative experiences of Physical Education in distance learning mode, recommendations for Physical Education teacher training in distance learning mode include additional lecturer-student face-to-face contact opportunities, additional technological training for students, the improved use of videos and other media for enhanced practical training opportunities, the increase of student-interaction functions in learning management systems and sufficient management and administration systems at universities. These recommendations can contribute to the improved effectiveness of Physical Education teacher training in distance education mode, and indirectly help to address the need for the delivery of qualified and effective Physical Education teachers in South Africa.

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Education, Human Capital Formation and Economic Growth in Sub-Saharan African Countries: A Conceptual Analysis

Abstract

According to the human capital theory variations in economic growth are explained by differences in the influence of education on human capital formation within countries. Despite huge government investment in education aimed at building human capital countries within the Sub-Saharan African (SSA) region continues to face low economic growth. This conceptual paper thus investigates the relationship between education, human capital formation and economic growth in SSA. Findings from the theoretical and empirical analysis reveal that education in SSA countries seems to make an insignificant contribution to human capital formation and economic growth jointly. In conclusion, the economic development variations observed across countries might be an indication of the need for a context-based human capital-based education approaches to strengthen economic growth within SSA countries. The study recommends that educational approaches that strengthen human capital creation should be adopted to promote economic growth in SSA countries.

Keywords: human capital creation, education, economic growth, Sub-Saharan Africa

Introduction

Although the human capital theory links education with the acquisition of human skills, knowledge and competencies that leads human capital creation which translates to economic growth in any economy there might be gaps on the implications and application of the theory that remains an explanandum. The human capital theory approach presumes that education increases the productivity and efficiency of workers by increasing the level of cognitive stock of economically productive human capability. Education facilitates economic growth through human capital creation that subsequently enhance the marginal productivity of labour, advance use of technology, technological innovations, earning and savings which all collectively leads to increased productivity (Marginson, 2019). The human capital theory assumes that education creates equal opportunities for development of human potential which contributes to economic growth.

Human capital theory thus provides a rationale and justification for nations' policy goals on investment in education aimed at promoting economic growth through human capital. Marginson (2019) explicates that human capital theory education driven policy goals are based on the assumption that, ensuring equality of opportunity to all available productive talent would become educated consequently optimising the economics of education. Various global bodies such as the United Nations Educational, Scientific and Cultural Organisation (UNESCO), Organisation for Economic Cooperation and Development (OECD) have advocated for the human

capital approach. Nonetheless, Marginson (2019) argued that despite the prominence and dominance of human capital approach in public policy there might be wide a gap between what is the envisaged application and implications in theory and the real world and societies.

Economic growth in SSA region is slower than in most regions. The United Nations Conference on Trade and Development (UNCTD) (2021) report shows that 33 least developing countries (LDCs) out of the 46 LDCs are from Africa and SSA region largely. An analysis of UCTD reports since 1971 the majority of LDCs are from the SSA region. LDCs states are deemed to be highly disadvantaged in their development process, structural, historical and also geographical reasons. This means that most SSA countries continue to be faced with vulnerable developmental and structural processes. Given that many countries in SSA are experiencing slow economic growth and yet it appears that it is impossible for any country to achieve economic growth without the necessary education that fosters human capital it is imperative for this study to explore the relationship between education, human capital creation and economic growth.

Educational philosophies and principles

According to Booyse and Du Plessis (2014) educational approaches are founded on different philosophies that determine and influence the purpose and intended implication of the curriculum, learning as well as the teacher approach. This means scientific theories provide theoretical insights and knowledge that influence education systems and practices.

Table 1 shows various philosophical approaches that underpin educational outcomes and its implication to teachers and learners in the educational process of teaching and learning. Booyse and Du Plessis (2014) explain that educational pedagogies are predominantly, behaviouristic, naturalistic and humanistic approaches. Wortham (2003) posits that those theories of education rest on the conception of human nature. Based on the conception of human nature underlying these theories the educational philosophies have their foundations. A naturalistic educational approach assumes that all rational beings have different intelligences that can be stimulated through using different learning approaches. Granger (1996, p. 87) describes the "multiple intelligences as variability in respect to the efficiency of the sensory input mechanism from person to person but the biochemistry/biophysics for recording, retrieval, filing and processing would essentially be the same would neither work nor not work". A behaviourist educational approach to teaching is considered as a systematic way of shaping the student's behaviour as such teaching and learning theories focus on reinforcing the desired behaviour (Wortham, 2003). In principle, behaviourist educational approach seeks to condition the student to produce the behavioural results. There is a consensus amongst education theorists that education should lead to productive livelihoods. However, it appears the challenges remain of the formulation of educational approaches that integrate human capital theoretical principles to the end of achieving economic growth.

Table 1: Various philosophical approaches to curriculum development and its implication to teachers and learners adapted from Booyse and Du Plessis (2014)

Approach	Behavioural	Academic	Humanistic	Naturalistic
Purpose	Relies on technical and scientific principles Paradigms, models, logical positivist, conceptual empiricists rational scientific	Knowledge content traditional intellectual, simplistic, rooted in philosophical and intellectual works	Non-scientific creative problem solving, progressive philosophy and child centred movement, meets demand of the society	Creative problem solving, pragmatic, cooperative curriculum
Curriculum implications	Knowable components that can be selected and organised	Curriculum development is systematic process directed by academic rationality and theoretical logic	Curriculum development is subjective, personal emphasises self-efficiency	Same curriculum elements of the academic experience –based and technological approaches can be used
Learning approach	Learners are significant influenced by their learning environment and their context	Direct instruction where the teacher is in control of the content and the sequence of the information that students receive Student focus on assimilating information through listening	Learners are highly motivated to learn and assume responsibility for their own learning	There is ongoing participation forms specific interest groups
Teacher	Teacher must perceive learning as cognitive functioning individual within a social context Managing, predicting and directing learning outcome	It is a fixed approach Teacher centred with the teacher as the centre of knowledge	Permission for more teacher inputs in curriculum decision Informal and hidden curriculum is also important, not only the formal and planned curriculum Facilitate learning as partner and not as an instructor	Teacher makes their ideas and values known Teacher centred approach

Theoretical foundations of human capital formation and economic growth

To understand why the phenomenon has grown over time it is important to gain an understanding of the conceptual and theoretical relationship between what human capital, education and economic growth from the human capital theory perspective. As far back as 1776, Adam Smith in his book *Wealth of the Nations* identified education and training as the most important investment in a human being that transform human abilities into human capital which subsequently translates to

economic growth in a country. Since then, scholars have extended research on the skills acquired through education as grounds for creating human capital and economic growth. The neoclassical economic growth theory beheld the assumption that economic growth in the production function is an output of labour, capital and technology. The neoclassical economic growth assumed the determinants of economic growth in the production function were only affected by external factors hence these theoretical assumptions did not directly include the concept of education and human capital formation.

According to Mankiw et al. (1992) the neoclassical theory suffered from two major weaknesses firstly, it disregarded education as a factor of production function instead explained economic growth as determined by variations of factor inputs that are exogenously determined and as well as an unexplained part which was called the Solow Residual. Secondly, the neoclassical economic growth conceptualised economic growth as an outcome that is dependent on exogenous factors which no one has control of with failure to explain determinants of these exogenous factors (Mankiw et al., 1992). This traditional substratum implied that economic growth policies were based, only on external factors and neglected internal factors. This demonstrates the shortcoming that resides with the application of only neoclassical economic growth theories that it overlooked the instrumental role played by education.

Scholars subsequently, in 1960s extended the neoclassical theory to incorporate internal policies and factors that might explain economic growth, the proposition that human capital was the residual factor that explains growth that is not accounted by an increase in capital, labour and technological advances was increasingly explored. Schultz (1961) findings showed that an increase in national output has been largely due to human capital compared to non-human capital such as an increase in the number of hours worked, land or physical and monetary capital. Schultz (1961) submitted that even though people acquire useful skills and knowledge, these are often not considered as a form of capital, yet it is this form of capital that is part of the product of deliberate investment that has led to the growth of Western societies at a faster rate than conventional capital and it forms the most distinctive feature of the economic systems. Schultz (1961) findings revealed that an increase in national output has been largely due to human capital compared non-human capital such as an increase in the number of hours worked, land or physical and monetary capital. Mankiw et al. (1992) developed an augmented Solow model that incorporates human capital as an additional explanatory variable that explains the human capital accumulation. The intersection between education and human capital in promoting economic growth is thus encapsulated in the human capital. Since then, there is a global emphasis on human capital driven education and economic development policies in many countries.

Empirical evidence from comparative studies of developing economies

Although theoretical assumptions provided the necessary universal theoretical armoury for the principles behind governments' investment in education empirical evidence on the relationship between education, human capital formation and economic growth in SSA countries is inconclusive. Oseni et al. (2020) observed that most SSA countries' government spend some amounts on education every year yet

the impact of such expenditure on education is inconsistent. The observed absence of economic growth in SSA raises a question about the relevance of the education to develop the human capital that contributes to economic growth as postulated by the principles of the human capital theory. These questions seek not to reject the validity of the human capital theory but rather to appeal for more scholarly debate and inquiry into the phenomenon to the end of bringing Prometheusian fire and light to the plight of the region. Whilst empirical evidence observed that educational variables that have an effect on economic growth differ across countries it does not commit to identifying the different schooling aspects which are likely to have a different effect due to different contextual factors, suggesting that educational intervention or approaches may not work the same everywhere and the same time.

Wang et al. (2021) concluded that economic development in Sub-Saharan African countries needs to reach certain thresholds of economic development first before the human capital expenditure of health may benefit the SSA region. Angrist et al. (2021) findings revealed that Africa as a whole has the average lowest learning of 352 lagging behind all other parts of the words which rated Average scores by region are as follows: East Asia and Pacific (445), Europe and Central Asia (489), Latin America and the Caribbean (402), Middle East and North Africa (399), North America (529). The study used average learning as a proxy for measuring human capital across a total of 162 countries. The low average learning found by Angrist et al. (2021) implied that Africa has the lowest human capital formation for the stated period. These findings are consistent with those World Bank (2021) who observed that the human capital index for the region falls behind 0.3 compared to standard global ranking of above 0.4. This evidence suggests that whilst education has not yet reached the threshold where it creates the human capital necessary for economic growth in SSA. Yet again the other message that might be drawn from these findings could be that the human capital theory is valid within certain conditions and invalid in other parts of the world.

Oluwatobi et al. (2020) found that SSA required human capital to build a knowledge driven economic growth. These findings suggest that SSA countries can promote economic growth through building human capital within their countries. These views affirm the theoretical principles postulated by Romer (1989) a proponent of the human capital theory who estimated in the equation of economic growth estimate. Romer (1989) observed that education represented the residual factor that explained the greater portion of the change in economic growth despite the increase in physical productive factors that is the number of work, the number of hours, and the total number of hours worked. Romer (1989) expounded that persons with greater skill may raise the productivity of others with whom they interact, therefore accumulation of human capital may increase total factor productivity in an economy. This implies that education as an important means for investing in human capital and health which jointly drive economic that contribute to economic growth. Romer (1989) attributed physical skills, educational skills acquired in primary and secondary schools as well as scientific talent acquired in post-secondary school as key determinants of economic growth in any economy.

Abdouli and Omri (2021) found a bidirectional causality relationship in 19 Asian countries during the period of 1985 to 2017. These findings highlight the critical role that educators play in building stock of human capital that facilitates

economic growth. Findings in a study by Fukao et al. (2021) revealed that in Japan for 130 years from 1885 to 2015 experienced increased labour productivity which can be attributed to human capital as a major contributing factor to economic growth pre and post the world war eras in that country. In particular, they found a total increase in Japan's labor productivity rose 46-fold, with increases in the capital-labor ratio accounting for 40% of this rise, improvements in labor quality for 35%, and total factor productivity (TFP) growth for 36%. Fukao et al. (2021) findings validated theoretical assumptions of human capital theory. However best as the evidence asserts the generally accepted principles of the human capital theory it can be argued that the whole theoretical constructs cannot be held to be true without exception. In contrast to Fukao et al. (2021) findings as well as the principles of the human capital theory Mohamed et al. (2021) found that an insignificant effect of human capital on economic growth was attributed to amongst other things lack enough capacity in Egypt to utilize the productivity of human capital efficiently. It is evident from these findings that human capital theory in its attempt to explain education and human capital concepts into a scientific theory that cover the whole universe in a coherent and unified way it does not and maybe cannot show that it follows of necessity from the social science nature of things. However, it would be a mistake to assume that the human capital theory is not relevant to the SSA countries without questioning and understanding the necessary conditions that should predicates education to develop human capital which drives economic growth. What we would rather be said is that implications and application of the human capital theory in other context represents favourable examples of what education could produce under a given set of conditions.

Conclusion

It can be concluded that education within SSA has not adequately developed to promote human capital formation and economic growth as an outcome. This implies that although the human capital theory may hold promises to better development of human beings and their societies, its effect is depended on the condition of the context it is applied. Therefore, this study recommends that Sub-Saharan African countries should explore alternative approaches for building educational systems that are based on the human capital perspective to foster human capital creation and economic growth with their economies.

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Managing Racial Integration in BRICS Higher Education Institutions

Abstract

The Sustainable Development Goals (SDGs) were developed by the United Nations in 2015 to encompass universal respect for equality and non-discrimination regardless of race, gender, ethnicity, and cultural diversity. Since 2000, Brazil, Russia, India, China, and South Africa (BRICS) have aligned with SDG 4.3 by developing higher education institutions (HEIs) which aims to "By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university". This was intended to create equal opportunities and permit full realisation and prosperity of human rights and human dignity. This paper explores the effectiveness of managing racial integration in BRICS HEIs and illustrates remarkable progress in research and policy enactment. Particular attention is devoted to the period from the mid-2000s when evidence around the globe exposed the presence of many forms of violence, which inhibit management of effective racial integration. Based on case studies from selected BRICS countries (South Africa, Russia, and Brazil), this paper explores how the management of racial integration is being addressed within these contexts.

Keywords: racial integration, management, higher education institutions, education, sustainable development

Introduction and background

The BRICS are joined by their large geographical and demographic dimensions. Furthermore, beyond the income dimension, inequality has a multi-dimensional character in the BRICS countries. This challenge is exacerbated by race, gender, ethnic, and geographic dimensions and, therefore, demands more integrated solutions. One of the problems associated with the high poverty levels and the perverse distribution of income is limited access to quality public services, such as education, health, housing, infrastructure, safety, and security. This relates to the sustainability of the current growth trajectory in terms of inequality, increasing environmental impacts, and regional and other imbalances. There have been, however, several recent changes that may open better prospects.

Such are sustainability challenges, the current paradigms and structures, as well as predominant practices in HEIs. Universities and colleges are facing this reality as they seek to meaningfully contribute to sustainability (Tilbury, 2011, p. 18). Sustainable development is not a new concept, yet it is complex and not easy to define. In 1987, the World Commission on Environment and Development defined it in the Brundtland report as "meeting the needs of the present without compromising the ability of future generations to meet their own needs" (Kibert et al., 2011, p. 11).

In 2002, the United Nations declared 2005-2014 as the Decade of Education for Sustainable Development, with the objective of integrating the principles and practices of sustainable development into all aspects of education and learning, and appointed United Nations Educational, Scientific and Cultural Organization (UNESCO) as the lead implementing agency. One of the most important missions of the United Nations (2014) was to provide quality education, with equality identified as an indicator for sustainable development (Bontis, 2004).

Problem statement

There is undoubtedly a need for HEIs to adopt a whole-institution approach which would include transformative leadership, encourage capacity development, and require an assessment of the institution for sustainability. HEIs must engage with different types of knowledge and work with critical community groups, such as the youth, previously disadvantaged ethnicities, and the private sector, and engage with policy issues.

BRICS countries have attached great importance to collaboration in higher education. In cooperation within BRICS, certain achievements have been made. Sustainable development is the only possible basis for the description of the progress of the national economy in the context of the deepening of global human problems (Kankovskaya, 2016, p. 449). In the context of globalisation, cooperation in education plays the special function of promoting cultural exchange, economic development, and information exchange. Racial integration in HEIs has been a problem internationally as well as in South Africa.

The three countries cited above, Russia, Brazil, and South Africa were chosen because they have been characterised as nations of racial diversity. Diversity has been and continues to be enriched by indigenous Africans (Blacks) and many immigrants and refugees from countries around the world. The influx of immigrants led these countries to develop innovative practices of racial integration. The term racial integration broadly applies to the process of ending systematic racial segregation and discriminatory beliefs, actions, desires, projects, persons, groups, social institutions, and practices (Joubert & Bray, 2007, p. 20).

Theoretical perspectives

Seeking to understand the aspect of social justice, critical race theorists presume that racism has contributed to all contemporary manifestations in racially diverse educational institutions, in which differences are ignored. Therefore, critical race theory (CRT) supports a social justice framework and suggests an understanding of why effective racial integration is not taking place.

CRT is used in this paper to inform and expand critical approaches to racial integration in higher education institutions. Its first tenet is that society accepts racism as an ordinary and permanent fixture of life (Delgado & Stefancic, 2001). Comparatively, in Russia, Brazil, and South Africa, racism is part of the daily landscape and forms part of the so-called normal and natural, implying that there are inequitable conditions that occur systematically at policy level as well as overt acts of racism in HEIs (Foucault, 1972, p. 4). Thus, any solution to remedy the issue of

racism comes from unmasking and exposing the true nature of racism in all its permutations.

The second tenet of CRT raises awareness of the importance of understanding the historic effects of laws and practices and the way past inequalities impact on the lives of racially diverse students. In HEIs, racism persists but most institutions are not concerned with key issues around racial integration. At present, race issues remain hidden in practices and terminology such as assimilation, anti-discrimination, and colour-blindness (Naidoo et al., 2018).

The third tenet to CRT is the use of narratives and storytelling as a way of conveying experiences of those who were oppressed (Naidoo et al., 2018, p. 4). Delgado (1995) suggests that storytelling is engaged as a way of analysing the myths, presuppositions and life experiences that form the common culture of race. In addition, Mohanty (2000, p. 32) indicates that critical race theories rely on life experiences as a valuable and valid way to interpret the use of community dialogue.

Higher education institutions in Russia, Brazil, and South Africa

Russia

Brazil, China, India, and South Africa began expanding higher education during the late 20th Century. Russia acquired a complex system of higher education from the Soviet Union that was transformed after 1990 to resemble those of other countries (Schwartzman et al., 2015, p. 16). Special institutions were established for training in diplomacy and foreign trade. Russia took an active part in the regional Strategy on Education for Sustainable Development; however, many problems arose. These included ensuring equality in opportunities for higher education, eliminating gender inequality, caring for vulnerable groups, and improving the quality of education (Yuyun, 2018, p. 397). There was, however, increasing concern about the high levels of discrimination that ethnic minority students would encounter when they studied at Russian universities, for instance, insults, beatings, and official harassment were among the complaints.

Brazil

More than 130 years after the abolition of slavery in Brazil, enormous racial imbalances exist in the country. There have been many efforts to reduce racial inequality in Brazil and, over the past decade or two, it appears to have been successful. Although racial discrimination has been considered illegal since 1890, Brazilian racism has prevailed in implicit, but unfortunately pervasive forms (Ikawa & Mattar, 2009). Since 2005, there have been many debates in Brazilian society about the adoption of affirmative action for access to HEIs. The debates revolve around reserving places by establishing quotas for certain social groups. Among those who are in favour of the adoption of quotas, some argue for social quotas that include people who have a low family income or those coming from public schools; some argue for racial quotas for black and coloured, and possibly indigenous, people; and there are those who argue for both types of quotas.

Brazil and South Africa share several similarities, with both countries among the largest multiracial societies in the world and having striking race inequalities in social and economic opportunities and outcomes (Marteleto, 2012). The racial

context of Brazil is complex and resembles a range of interactions based on skin color, which differs from dichotomous forms of racial stratification. This emphasis on skin color over racial identity is partly due to the multifaceted racial ancestry of most Brazilians.

South Africa

In comparison to Brazil, the problem of racial integration is profound in South Africa because of apartheid, which impacted on the collective and individual psyches of all South Africans, Black, White and others (Nkomo et al., 2004). The historical development of education for the integration of racially diverse HEIs in South Africa can only be effectively evaluated against the backdrop of the educational history of the country. Since 1948, segregation was severely enforced, with racial, ethnic, and geographical separations within the education system that led to the formation of separate education systems prior to 1994. These divisions within education were supported and upheld by apartheid legislation, such as the Populations Registration Act of 1950, 1953 Group Areas Act, the 1954 Native Settlement Act, and the Reservations of Separate Amenities Act No 49 of 1953, the Bantu Homelands Citizenship Act of 1970 (Mda, cited in Alexander, 2001). This segregated system of education, characterised by race, class, gender, and ethnic divisions, has resulted in the provision of uneven access to schools, unequal educational opportunities, irrelevant curricula, inadequate infrastructure and facilities, and an under-qualified educator component.

Educational reform since 1994 has made significant attempts to address the imbalances of the past and to bring education in South Africa in line with international standards (Engelbrecht, 2004, p. 2). The subsequent white papers of the national government set the course for the transformation of the education system from the former apartheid system based on racial segregation to a democratic system. This system was based on equal educational opportunities for all students.

Findings

Racial integration in HEIs has been a problem internationally as well as in the three countries cited above. Diversity has been and continues to be enriched by indigenous Africans (Blacks) and many immigrants and refugees from countries around the world. The influx of immigrants led these countries to develop innovative practices of racial integration. The challenges of the various racial integration approaches as they unravel in Russia, Brazil, and South Africa will be discussed in this section.

Challenges of the anti-discrimination approach

Discrimination on the grounds of race or ethnicity is a pressing problem in Russia and is one which mainly affects racial and ethnic minorities. According to the *United Nations Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities*, minorities are groups with a national, racial, or ethnic, cultural, religious, and linguistic identity (United Nations General Assembly, 1993, p. 4). According to the United Nations *Durban Declaration and Plan of Action* (2001), existing laws, policies and programmes of the Russian

Government have failed to sufficiently eliminate racial discrimination against most vulnerable groups.

Challenges of the assimilation approach

The assimilation approach is to racially integrate minority groups or Black African learners into the ethos of the HEIs and the majority racial group. This meant that they had to adopt the language, culture and values of the institution while foregoing their own languages, culture and values. According to Gallagher (2004), the assimilation approach led to the inclusion of South African Black students into the way of life of the majority group but did not make any effort to engage with the minority group.

Challenges of the multicultural approach

Multicultural education did not address the issues on institutional racism (Banks & Lynch, 1986) and lacked the necessary strategies to enhance critical engagement among racially diverse groups. Gallagher (2004, p. 91) states that multicultural education did not "prevent racism but rather promoted it", some of the aims being to make Black students politically, economically, socially, and culturally compliant (Morrell, 1991). It failed to address the principles of social justice and human value.

Challenges of anti-racist education

The failure of anti-racist education lies in its inability to cultivate critical thinking skills and openly discuss challenges of racially diverse students that could enable them to connect and belong to an education system in which social justice and effective integration are practiced. According to Naidoo (1996, p. 38) the weakness of anti-racist education is its incapacity to display an "awareness of nuances, contradictions, inconsistencies and ambivalences".

Challenges of racial integration in South Africa

Inequality, division and segregation have been features of South Africa's history of education. In 1997, in response to aggravated forms of racism and oppression, the ANC had the main political objective of creating a united, non-racist, non-sexist and democratic country, which was called 'nation building' (Rajput, 1999). According to Vorster (2005), nation building can be defined as a social process of transforming a poor, and divided society into a society within which dignity and basic human rights are practiced within different racially populated groups. Twenty years later, this era of social harmony, development and prosperity still seems far-fetched. The media frequently reports that HEIs are characterised by racial tension, ignorance, misunderstanding and aggression as a result of the poor management of diversity (Meier, 2005).

Conclusion

In conclusion, many Black minority learners' failure or success at school is determined by their racially diverse backgrounds and a home language other than English. The paper highlighted approaches that are practiced by many educators, such as anti-discrimination, assimilation, colour-blindness, contributions, and

multicultural education. These approaches are limited and insufficient in dealing with racially diverse groups. HEIs should focus on the professional development of educators and morale about understanding the rights and responsibilities of education legislation, human rights, and democracy, as enshrined in the Constitution and legislation. The failure to address racism and other forms of discrimination will continuously undermine the intention to transform the higher education system and design if it does not relate to realities. Therefore, strong leadership and visible support are required by management structures to build momentum for change which is important for the reconstruction of systems in HEIs.

The aspects of CRT that would help in theorising the relationship between racism and racial integration include, first, the notion of effective racial integration as an ordinary, permanent fixture in society. Secondly, the historic effects of apartheid on education should be analysed in relation to creating effective racially integrated public secondary schools. Lastly, CRT needs to be used to engage narratives and storytelling to deliver the experiences of the oppressed and validate their experiences, existence, and the value they bring to their learning and others. Workshops on racial integration and social justice should be developed to debunk the myths educators have about students from racially diverse backgrounds.

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The Policy of Inclusion: A Comparative Analysis of Refugee Education Policies in Germany and Turkey

Abstract

Due to recent unrest around the world, the number of refugees has increased dramatically in the last decade. In order to meet the needs of this population, host countries have had to quickly adapt to provide these refugees with basic needs. One such need is to have quality education for refugee children. The aim of this paper is to compare the policies of educational inclusion in Germany and Turkey that have accepted a large influx of refugees.

Our findings suggest that both the German city-state of Hamburg and Turkey have made major strides over the past ten years to accommodate and provide for refugee children's educational needs. We list some of the policies that have led to greater inclusion and accessibility for refugee children in mainstream education. Key findings from the comparative document analysis show that although the two countries are distinguished by different levels of income and development, both have similarities in terms of (1) providing compulsory education for all children, (2) the delay in preparing and applying policy-based legislations for refugee education, and (3) the main activities such as additional language support and teacher training for the purpose of social inclusion of refugee students. Furthermore, both countries have had similar challenges such as the necessity of improvements in second language instruction and teacher training, thus highlighting the need for refugee education-oriented global solutions for the host countries. We recommend continued efforts to include multiculturally rich school curriculums to create educational settings that feel inclusive and comfortable for refugee children.

Keywords: refugee education, refugee children, integration policy, Germany, Turkey, Hamburg

Introduction

Over the last few years, the forced migration movement has reached peak levels and generated ubiquitous challenges on a global scale. It has created an unprecedented humanitarian crisis that affects both refugee communities and host countries, thus, requiring innovative and progressive responses. According to UNHCR (United Nations High Commissioner for Refugees) statistics (2022), 42% of asylum-seekers are children whose education has been interrupted and at risk of child labour, child-marriage, violence, and mental health disorders. Integration of refugee youth into the respective educational systems has become a priority for host countries so that uprooted children can return to a sense of normalcy in a safe and healthy environment. However, education policies and practices are subject to change according to the resettlement countries, creating different experiences for each refugee child.

This paper invests in the comparative analysis of refugee education policies of two countries, Germany and Turkey, which are among the five countries receiving

the largest number of refugees (UNHCR, 2022). We have chosen the respective countries based on The World Bank country income level classifications. Accordingly, Germany, which hosts 1.2 million refugees, is a high-income country among the most developed countries in the world, while Turkey, which receives the largest number (3.7 million) of refugees, is an upper middle income country among the developing countries. By choosing different countries which are distinguished by income and level of development, we aim to pinpoint the similarities and differences in education policies for refugee youth and explore distinctive perspectives that might shed light on the pressing need to determine the role of educational practices in providing the smooth transition of uprooted children to new educational systems and to the societies. Thus, we aim to answer the following research question:

What are the educational policies for refugee children in Germany and Turkey?

Methodology

The present conference contribution is based on a comparative documentary analysis of government documents, policy papers, and scholarly articles. For Germany, policy reports from School and Vocational Education Authority (Behörde für Schule und Berufsbildung) and the Expert Council on Integration and Migration (Sachverständigenrat deutscher Stiftungen für Integration und Migration) were included. Regarding Turkey, circular letters issued by MoNE (Ministry of National Education) as well as UNICEF (United Nations International Children's Emergency Fund), UNHRC, and UNESCO (The United Nations Educational, Scientific and Cultural Organization) reports related to refugee students were collected and analyzed. We also included Korntheuer and Damm (2020) and Crul et al. (2019)'s scholarly articles on refugee education to interpret the government documents and policy papers more precisely and to identify the policy gaps.

Results

Germany

Since 2015, Germany has accepted a large number of refugees, thus requiring the decentralized education system to quickly adjust to accommodate the needs of refugee students. Due to the vast differences in the educational practices across sixteen German federal states, it would go beyond the scope of this paper to present the refugee education policies across the country. Thus, we have chosen to focus on Hamburg, which is one of the three major city-states with almost 1.8 million residents. It has also been one of the major areas into which refugees arrive, with over 400 refugee children entering into the Hamburg education system every month throughout 2015 and 2016 (Crul et al., 2019).

According to the national statistics, there were over 100,000 asylum seeking children under the age of six, who arrived in Germany in 2015 (SVR, 2017). To bring a sense of normalcy, it is important for those children to have a legal entitlement to education from an early age. Accordingly, early childhood education in Hamburg starts at the age of one and lasts till the age of six in day care centers that are known as 'Kita'. All children residing in Hamburg are entitled to enroll into Kitas up to five hours a day without any cost, including the offspring of refugee

parents from the day of entry into the country. Furthermore, Germany has made notable and progressive changes with the whole-of-government approach such as opening up Sprach-Kitas to provide second language instruction from critical ages by investing up to 400 million euros to improve the program and increase the number of staff between the years of 2017 and 2020 (Park, Katsiaficas & McHugh, 2018).

According to the Hamburg Education Act, compulsory formal education starts at the age of six with four years of primary school, then continues with the selection of secondary schools for the various educational tracks (e.g., academic and vocational) and lasts until the age of eighteen. The city-state does not distinguish between those who are officially born and raised in Germany and those who are asylum-seekers. Unlike other German federal states, such as Lower Saxony, refugee hosting centers are recognized as primary residence places, thus allowing refugee children in Hamburg to be directly eligible for compulsory education regardless of their residency status (BSB, 2018). This is important in many ways since the length of asylum procedures may possibly affect the refugee students' mental well-being and educational practices. Accordingly, those who stay in shared households at reception centers lack privacy, restricting the play time and physical activities for minors. Moreover, the quality of education provided in reception centers were found to be lower than mainstream education (Korntheuer & Damm, 2020).

It should be highlighted that Hamburg was one of the few cities which had not established refugee-related specific regulations for formal education until 2015 (Weiser, 2016). The legislative changes were made relatively late after the rapid rise in the number of refugee youth. Accordingly, the Hamburg Education Act has granted the legal right for school authorities to place refugee students into the schools to prevent possible refugee overpopulation in particular places, as well as establishing a five-level program for the entrance of refugee students into the educational system. The above mentioned five-levels are listed as follows: (1) Entrance into the nearest reception centers, allowing refugee youth to have an immediate access to study groups; (2) Transferring to the accommodation at a shelter or flat in the city, allowing students to be assessed for eligibility of international preparatory or basic classes; (3) Education given in basic classes for illiterate refugee children for a year; (4) Education given in international preparatory classes for a year; and (5) Additional second language acquisition support for up to a year (Korntheuer & Damm, 2020). Furthermore, in 2018, the city-state published a more detailed framework for the integration of refugee youth into formal education, discussing the school curriculum and various versions of basic and international preparatory classes that are designed to meet specific needs of children (Korntheuer & Damm, 2020).

Turkey

Thanks to its 'open door' policy, Turkey has welcomed a record number of refugees fleeing from the outbreak of conflict in Syria since 2011. The Turkish government started to grant refugees 'under temporary protection' status (UTP). According to the welcoming policy, Syrians were 'temporary guests' who would return back to their country soon after the problems were solved in Syria. The Turkish government had not necessarily applied systematic policies for Syrian

refugee children to integrate into mainstream education, therefore, education was provided in refugee campsites at first. In 2013, the very first circular letters were issued by MoNE, which firstly focused on identifying existing and possible educational centers for refugee children residing out of campsites, then focused on the educational needs of Syrian children in the campsites, the teacher supply in the Arabic language, and the possible solutions for those who were invested in learning the Turkish language (MoNE, 2013a, 2013b). However, the increased refugee influx required further actions to ensure quality integration procedures. Accordingly, all children in Turkey are subject to compulsory education of twelve years, starting at age six (i.e., the age of starting primary school) until eighteen years old (i.e., the age of finishing high school). However, Syrian children's enrollment rates were rather low due to the legal obligations of the need to have a student residence permit to access education. It initiated MoNE to lift legal restrictions by granting the right to education for every refugee child UTP as of 2013. Additionally, with the support of the new framework published in 2014, the Turkish government secured and centralized the educational practices for refugee children in general (MoNE, 2014).

With the support of UNICEF, temporary education centers (TECs) opened in over twenty cities across Turkey, providing education for school-age refugees in and out of campsites. TECs adapted the national curriculum of education in Syria and provided education in Arabic. Meanwhile, the Turkish government allowed Syrians to migrate to urban places in Turkey, thus allowing them to enroll in Turkish public schools (TPSs). The transition from TECs to TPSs led to high levels of success in terms of school enrollment rates particularly between 2014 and 2018 (UNICEF, 2019). Despite the increase in enrollment rates, 40% of children UTP still had no access to education, therefore, the Turkish government began to apply its newly established policy of full integration to prevent the 'lost generation' of refugee children. It was, then, declared that TECs no longer accepted new students as of 2018, making inclusive education the priority of the government.

To ensure the integration of refugee children into to mainstream education, the MoNE implemented a European Union funded project, namely, PIKTES (Project on Promoting Integration of Syrian Kids into the Turkish Education System) across twenty-six cities in Turkey under the guidance of MoNE 2023 vision (Tuğrul, 2019). The main activities of PICTES included providing Turkish language courses, transportation and stationery support, training for school teachers and principals, catch-up and remedial courses, and increasing school attendance.

Comparison of countries

Although there have been some distinct differences between the two countries in terms of refugee educational policies, they both strive for the social inclusion of refugee youth into the host countries' educational systems. With projects supported by the governments and the EU, these countries have attempted to eliminate their common challenges (e.g., language support, teacher training, attendance rates, guidance and counseling incentives). In the present comparative analysis, we identified three main similarities between Turkey and the German city-state of Hamburg: (1) providing compulsory education for all children, (2) the delay in preparing and applying policy-based legislations for refugee education, and (3) the

main activities such as additional language support and teacher training for the purpose of social inclusion of refugee students.

Based upon the Hamburg Education Act, all children residing in Hamburg are required to attend compulsory education that lasts eleven years in total between the ages of six and eighteen. Similarly, as of 2013, the Turkish government gave the legal right to all refugee minors UTP to be subject to twelve years of compulsory free education as their Turkish counterparts.

Both Turkey and the German city-state of Hamburg, in particular, have experienced delays in preparing and applying policy-based inclusion of refugee students into the respective educational systems. Accordingly, since the beginning of 2015, Hamburg experienced a visible rise in the upcoming students in need of preparatory classes and counseling support. However, in 2012, the city had already published a framework for newly arrived students and their transition into formal education, thus they had not necessarily implemented new legislations up until 2017 and 2018 when the changes were highly needed at both federal and national level (Korntheuer & Damm, 2020). Similarly, Turkey did not take an immediate action to accelerate integration procedures at the beginning. The main reason being anticipation that the conflict in Syria would be short-lived and thus, it would be feasible to accept refugees temporarily in camps (Akyuz et al., 2018). However, by the end of 2013, the Turkish government started to make progress in refugee education with the help of the United Nations, and the official integration procedures began in 2016 with the newly established policies (Akyuz et al., 2018).

Despite the differences in level of income and development, both countries have had similar goals to achieve in reaching out to refugee students' educational needs. For instance, the additional language support for second language acquisition has been one of the pivotal foci to ease the adaptation procedures of minor students to new cultures, societies, and mainstream educations. Another focus was given on preparatory classes in Germany in which refugee minors were required to attend up to one year. In Turkey, TECs served as preparatory schools for smooth transition to mainstream education. As of 2017, first, fifth, and ninth grade minor refugees were subject to enter the Turkish educational system for the purpose of a full integration mission of the government. Guidance counseling services have been given for the direct transition procedures in addition to remedial and additional classes. Lastly, both hosting countries have greatly invested in teacher recruitment and training services to meet the high educational demands of minor asylum-seekers.

Conclusion

The present study highlights how Germany and Turkey's vigorous initiatives in integrating the largest refugee minor inflows into the mainstream education systems have been remarkable. Accordingly, a number of thoughtful and policy-based approaches have been implemented in both countries to ensure equality in educational opportunities for underprivileged refugee minors. Despite the differences in the levels of income and development between the two countries, similar attempts, outcomes, and challenges have been identified in refugee education practices, thus showing the need for global and sustainable solutions for the educational needs of refugee minors.

Based on the findings, future research is recommended for a more comprehensive and detailed analysis, particularly among the five countries hosting the largest number of refugees: Turkey, Colombia, Uganda, Pakistan, and Germany respectively, each with differing levels of income and development. We also suggest that future research be required to focus on rigorous research methods such as longitudinal studies to measure the effectiveness of the currently applied policies and project-based activities.

We recommend that both countries enforce structural approaches to identify and analyze the attendance rates of refugee minors who are most likely to be exposed to child-labor, child-marriage, and mental health disorders. Furthermore, government and school-based refugee awareness activities should be provided for school staff, families, and local students to foster social inclusion and to prevent bullying and discrimination towards refugee students. Lastly, multiculturally inclusive school curriculums should be utilized to create a welcoming and healthy environment for all minority students.

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Part 3

School Education: Policies, Innovations, Practices & Entrepreneurship

Gillian L. S. Hilton

NQT to ECT – the New Induction Programme for Teachers in England: An Overview

Abstract

This paper examines the newly introduced Induction Framework for teachers in England. The new term of early career teacher (ECT) has replaced the NQT label and the one-year programme has been extended to two, based on the *Early Career Framework*. The reasons for the change are to aid recruitment, prevent high numbers leaving the profession early and to provide a better, more structured and statutory framework for new teachers' development in schools. However, this has resulted in considerable change and accompanying stress for school leaders and staff, with a greatly increased workload. Training materials have been provided, including programmes for induction tutors, mentors and for the ECTs, though schools may write their own. Funding has also been provided by government to cover the costs of providing meeting, observation and discussion times. The final decision as to passing of the Teachers' Standards is now in the hands of an external body, who will moderate the training provided and make the final decision on each ECT's induction success or failure. First results show agreement from most of those concerned that the more structured approach to induction and longer time is a plus, but there are grave concerns about the rigidity of the programme and the time management of a fluid situation plus, the added responsibilities for staff. The pressures of Covid infections at the present time being immense.

Keywords: induction, early career teachers, mentors, teacher drop-out

Introduction

In its own introduction to the Early Career Framework (ECF), the Department for Education (DfE, 2019) finally acknowledged that the one-year induction programme, previously used for all newly qualified teachers (NQTs) was not good enough.

> *… too often, new teachers have not enjoyed the support they need to thrive, nor have they had adequate time to devote to their professional development… The package of reforms will ensure new teachers have dedicated time set aside to focus on their development.* (DfE, 2019, p. 4)

In the author's experience as a teacher educator over many years, it was clear that the provision of mentoring support, for those in their first year of professional life, was at the least patchy and often poor. Of late, the DfE has also acknowledged that the drop-out rate of new teachers by the fifth year in the profession is alarming (Hilton, 2017). This, though mostly attributed to the massive workload, poor pay rates and poor behaviour of students, a large part was played by the unstructured and limited support provided for some new teachers, by the one-year induction programme. There was a lack of good mentoring by properly trained mentors and the provision was, in some schools, done with an insufficiently serious attitude towards the need for excellent care and guidance, for those new to the profession. Indeed, in some cases in the author's experience, it was entirely lacking and little was done in some schools or departments to challenge this poor response. Now, serious attempts are being made to improve this situation, as noted in the government's documents and the education press and from some limited research undertaken here. However, combining these changes with the stresses of the pandemic are proving extremely difficult for school leaders.

The induction process

The new Early Careers Framework (ECF) sets out much more clearly, what is required in the now two-year induction process, including clear goals to be achieved during this learning and move towards professionalism. The now Statutory Guidance Document (DfE, 2021) must be followed by all maintained relevant schools, and includes the roles of bodies such as Local Authorities, Academy chains, British School Overseas (BSO), Pupil Referral Units, Further Education and Sixth Form Colleges, Teaching School Hubs and Nursery schools. Every teacher employed in establishments where induction is mandatory must complete the two-year induction satisfactorily. The induction guidance is not an official assessment process, that assessment is carried out in relation of the Teachers' Standards (DfE, 2011, revised 2013, 2021). The ECF is however, a structured programme to be embedded in the induction process and in the first year, ECTs will have a 10% timetable reduction and in the second a 5% reduction. This is to enable them to have time to complete the programme, discuss their progress with mentors and induction tutors. In order to begin induction to teaching, the ECT must have been awarded Qualified Teacher Status (QTS), by an approved body. The induction period will be overlooked by what are termed, 'appropriate bodies', appointed by government, who will judge the success of the offered programme and decide if the inducted teacher has achieved the standards required, using the evidence provided by their headteacher. This 'approved body' must be chosen from one of the following groups and the agreement must be in place before the ECT begins teaching (DfE, 2021, p. 16):

A local authority with which the school reaches agreement
A teaching school hub (subject to the conditions)
National Teacher Accreditation (NTA)
The Independent Schools Teacher Induction Panel (IStip) (for their members and associate or additional members only)
The local authority in which the school is situated (if agreement cannot be reached between the school and one of the above)

This provision will be paid for by the school and the 'approved body' will be responsible for monitoring the support given to the ECT throughout the induction process, in addition to making the final decision about the passing or failure of induction by the ECT.

Schools will have an induction tutor who oversees the process and for each ECT, a trained mentor will be in place. The ECT will be regularly monitored throughout the process with two formal assessment periods, mid-way and at the end of the induction period. Part time ECTs will have this adjusted to suit their employment. However, if they can achieve the teaching standards earlier, this is acceptable. Any programme used must ensure it follows the ECF and prepares the ECT for assessment. Any teacher who fails to complete the induction period successfully, will not be allowed to repeat the process (though appeals will be allowed), but may keep their QTS from the training course undertaken. Schools in special measures will not be permitted to employ any ECTs.

Purpose of induction

This is to ensure that there is continuity between initial training and moving towards becoming a professional teacher. The ECF providing guidance for the programme to be followed and the Teachers' Standards, the level against which the ECT is assessed. The idea is to provide the ECT with 'the tools to be an effective and successful teacher' (DfE, 2021, p. 8). However, requirement for induction is related to the maintained or not, status of the school, as many schools are now outside of local government control.

Somewhat confusingly the DfE states that:

> *There is no legal requirement to satisfactorily complete an induction period if an ECT intends to work solely in the independent sector, an academy, a free school, a BSO, an independent nursery school or an FE institution. However, it may be possible for an ECT to serve a statutory induction period in such settings as set out in this guidance.* (DfE, 2021, p. 9)

It will be interesting to observe how these educational organisations will react to the optional requirements but it is possible to speculate, that they will in most cases follow the induction process or the future career of ECTs could be made difficult, if they wish to move to a school which requires that the induction process was successfully passed.

It is essential that the ECT is appointed to a role that is appropriate for their experience and gives them the opportunity to move on and learn. In addition, schools will have to ensure, that the pressure of teaching difficult classes is not normally imposed on ECTs. Nor should they be expected to teach outside of the age range for which they trained. Non-teaching duties are to be supported with guidance and training. As required, independent assessment as to the quality of the induction provided will be made by the named appointed 'appropriate body'.

Providers of training

Schools have a choice of programme provider. This may be a DfE funded provider, who will design and deliver the funded programme, face to face and online. Schools may also choose to deliver their own designed programme, based on

the ECT Framework, using free DfE approved materials. These include materials for the ECT and the mentor. Induction tutors and mentors must be appointed by the school from teachers with QTS and appropriate experience. All holders of these roles need to be given sufficient time to undertake them and to complete the requisite training, by relief from other teaching duties. In addition, the ECT's teaching practice must be assessed regularly by the induction tutor or another appropriate person, against the Teachers' Standards. Records of these observations must be kept and a discussion be undertaken between the observer and the observed, regarding progress. The formal assessment against the Teachers' Standards are made by the head or induction tutor and judgement from their reports as to the success or otherwise of the ECT, will be made by the appointed body as mentioned above, from the records kept. From these records the headteacher will recommend the passing or failure of the induction period for the ECT; the 'appropriate body' making the final decisions.

The ECF programme was trialled in various areas, prior to universal rollout. Researchers from UCL examined 3 pilot programmes prepared for ECTs and mentors and run by external providers. The initial results (Hardman et al., 2020) demonstrated that the new programme of the training for ECTs and mentors, could become embedded as a normal process in school life, resulting in a cultural change in schools' attitudes to new teachers and to mentors. The programmes also enabled the embedding of current research more readily into school practice. This they believed, could improve retention and enhance teacher standards. However, there were serious concerns about the increasing workloads for all concerned. These findings resulted in a guide produced by UCL Institute of Education, to help schools prepare for and introduce the new ECF (Daly et al., 2021).

Maximising the ECT experience

In order to make most use of ECTs abilities, Sykes (2021) suggests that ECTs should be able to question the status quo in schools and be encouraged to put forward ideas, not discouraged, as often happens Experienced teachers, can learn from the new ones. For example good digital skills and an awareness of what gaps in their own learning, as well as those of the ECT, may need to be supported, in order for both to improve. In addition, communication between experienced and new teachers needs to be actively encouraged, to enable a sense of belonging for the newcomers. It is essential to ensure that new ECTs have a chance to relate to other ECTs socially, to gain support and to their experienced colleagues, who can be a great source of advice and encouragement. Above all, the role of the mentor can make all the difference to success or failure. Ensuring that mentors carry out their duties well and that they are given the requisite time and space to so do, helps achievement of success for the ECT. Brewer (2021) asks why mentoring now is seen as so essential, yet has featured so little, until the present legislation put it at the core of the in-school training of new teachers? This author also asks why in the past excellent teachers have been presumed to be those who will be excellent mentors, as this should not be assumed. Further questions also have to be asked such as, should all teachers be expected to mentor others; how can mentors be given the requisite time to do their best for the ECT; what criteria should be applied when appointing a mentor (for example good subject knowledge, excellent teaching skills); how can

mentors be supported when their ECT is not performing as is expected, as good coaching from mentors is now expected; how can mentors be prepared to deliver these new skills and use up-to-date research to underpin their coaching of the new teacher?

In addition, Parker and Hallahan (2021) point to the fact that all staff who observe the ECT for a lesson and offer feedback, will need to understand the new observation protocols (they have to occur more frequently), therefore requiring more cover allowance for the teacher observers. They will however, have less of an influence on the final outcome for the ECT. Mentors too they say, will need sufficient time to work with the ECTs and also have time to undertake the training provided and gain a clear, deep understanding of the ECF.

Teething troubles

As for all major changes in policy, well received initially, the ECF as it was introduced into schools in the autumn term of 2021, started to become an area of concern. Severs (2021, p. 3) describes the ECF as an excellent proposal in theory but that, 'it is part of a shifting of responsibility for teacher retention onto schools'. Reports of concerns about the massive amount of time required for ECF's implementation and the lack of early enough training for the new mentors and others involved in the ECF process, began to emerge. Severs (2021) further questions if the teachers delivering the new induction process are sufficiently adept in the skills required, have the necessary motivation and have been awarded the required status for their role to be taken seriously? This author questions if the appointed teachers are sufficiently motivated to undertake the task, in addition to their already high workload? This presents a problem for school leaders, as if they fail to retain ECTs in the profession, the school and its programme will be blamed, rather than a poor salary and difficult working conditions.

At the end of the first term of implementation, reports began to emerge (Hallahan, 2022) that there was frustration over the rigid structure of the ECF, some of it already covered by new teachers in their initial training. There was an absence of an individual, flexible approach to the new teachers coming into schools, with very varied experiences. This is becoming a real issue for schools, mentors and induction tutors are labelling the ECF regime as rigid and criticise its lack of adaptability to serve individual needs. There is a lack of understanding it appears, of the widely differing needs of the ECTs, their strengths and weaknesses and their different initial training regimes. Additionally, there is too much concentration on form filling, reading material and watching videos to a strict timetable, not individually focused or related to specific needs. Teachers questioned by Hallahan (2022) were also concerned that needed changes to the ECF would not occur quickly, or at all. When questioned on this. the DfE up till now (28.01.2022), has not responded, but one provider of course material has agreed that the programme needs revisions and that the work overload is of great concern.

At the end of the first term of implementation the NAHT union, which represents school leaders, reported that after surveying over 1000 schools there were serious concerns about the ECF and its work overload for ECTs, mentors and induction tutors. The results show ninety-five percent of leaders questioned,

believed ECTs workloads were far too high and as a result the ECF will drive people out of teaching (NAHT, 2021). Mentors too are overburdened.

Research

Interviews were conducted within a large secondary Academy (part of a major Academy chain), where the head had opted to offer new teachers the ECF induction package. The school was using government approved materials to deliver the two-year programme and an 'appropriate body' had been agreed, in order to judge the progress of the new teachers and their success or failure of induction. The induction tutor (female) and two members of staff (one male one female) who had mentoring responsibilities in maths and English subjects, were interviewed over Zoom. The head however, was reluctant to allow the ECTs to be involved in the research, citing the pressures they were already subjected to. In addition, the head of a small one-form entry primary school agreed to be interviewed. This year no new teachers had been appointed, but the head was well aware of the ECF and what she would be obliged to undertake in future years.

In both schools the idea of mentoring using properly trained mentors and a two-year programme was seen as the way forward, in order to improve the entry of new teachers into the profession. However, the practicalities of the introduction, with Covid still raging, causing multiple absences of teachers and students, was raising great anxiety and problems, particularly in the secondary school. On the whole the mentors and induction tutor were pleased to receive training on these roles, but the aspect of the time involved to undertake the training and oversee the progress of the new teachers, was causing a great deal of strain on the school system. Although extra government funding had been supplied to allow those in positions of responsibility to undertake their new duties, cover teachers had been difficult to find, as a result of the Covid pandemic.

> *Sometimes it is impossible to find someone to cover my meetings with new teachers, as there are no cover staff out there, as so many teachers are off sick or isolating, due to being near an infected person. I am doing the training in my own time.* (Induction tutor)

Similar problems were encountered by the mentors, the maths teacher in particular explaining:

> *The country is already short of maths teachers and this is an added burden, there are not the specialists out there to cover lessons. I am having to set work and school staff do the covering. It's not acceptable to burden them in this way, but all we can do in these difficult circumstances. Plus, I then have to correct the work done in these classes taken by anyone who is free.*

In addition, the interviewees were concerned with the rigidity of the programme and its lack of an approach that really worked for individuals and their specific needs, which all differ. It was they thought, a 'one size fits all approach' which is not helpful and that there should be a possibility to move the sections studied at various times, to suit individual needs of ECTs.

Similar concerns were expressed by the head of the primary school.

> *We are a small school with little extra staff time to cover lessons, as everyone is more or less occupied all the time. I am thankful that the induction tutor has been able to do the training in her non-teaching time, but what we will do when the*

school does have, say more than one new teacher? It will be so difficult to find cover on such an irregular basis, to observe odd lessons and discuss progress with the new teacher and the subject lead teachers in the school. I realise that extra funding will be provided, but this is not similar to cover for a teacher off sick for a week or longer, but small stretches of time for observations, discussions etc. I can see it all being done at lunchtime or after school, which is not fair to any of those involved. The idea is excellent and it is right that new teachers should be given good support and training on the job, but how to organise it worries me greatly. I hope to ask other heads locally how they are managing this experience, before I have to put ours in place practically.

Conclusion

Hardman (in Amass, 2021) suggests that the ECF is major move away from the old system towards a clearer framework, specifying what rights all new teachers have to ongoing support, the knowledge they need to acquire and the stress on research informed teaching. This is aimed at improving quality and recruiting and retaining new teachers in the professions. However, the new system has implications for schools, regarding time allocation, the provision of cover staff, the good use of government funding and more. In addition, in large schools it is possible that a team needs to be established to ensure that all departments are following the implementation of the framework in similar ways. The choice of programme, from one funded by the government or one self-devised, needs careful consideration, as the time required to plan and implement a totally in-house new programme, will impact heavily onto staff. In small schools however, the ECF may be in the hands of only one or two people and ensuring all staff have knowledge of the new system is essential. Timetabling will be another challenge, with training for mentors, the induction tutor, plus mentoring and discussion and assessment times between ECT, mentor and induction tutor, built in. This will change annually depending on how many ECTs are employed. Mentors will need to be carefully chosen and their training and that of others involved in the process, strategically inbuilt. This will require good ICT provision, as the training programmes are based online. Alongside all these concerns, has to stand the realisation that the ECF is not a tick-list, or the only area where a teacher needs to achieve success. Other areas, such as becoming and acting as a professional, successfully acting in the administration/general school roles and constantly increasing subject knowledge and skills, such as online teaching are essential. Plus the need for high standards of ethics expected by the profession, is a requirement for excellent teachers. To achieve all this there needs to be a major cultural shift in schools in the way teachers are inducted into the profession. This move is undoubtably sensible, but it is putting immense pressure onto already stretched schools and teachers, in the middle of a pandemic.

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Chasing a Balance between Equity and Quality: The New High-Quality Schools Project in Shanghai, China

Abstract

After PISA 2009, Shanghai education has received unprecedented attention from home and aboard. The government in Shanghai summed up the successful experience and launched the New High-Quality Schools (NHQS) project as a response. Under the policy background of promoting high-quality and equitable compulsory education in China, the NHQS project undertook the unique task of creating high-quality educational resources. The project is not only an honorary certification for the project schools, but also an organized small-scale school improvement plan. Compared with the National Blue-Ribbon Schools (NBRS) program in the United States, both projects encourage schools to create high-quality education from a bottom-up approach and provide a platform for excellent schools to share experiences. The distinctive features in the NHQS project are that it emphasizes the indispensable importance of quality with equity, and is more guided by the government. The "Green Indicators" used in the NHQS project go beyond a single criterion of student achievement in the past. However, as the overall assessment system in China has not changed, such small-scale attempts are still facing many difficulties.

Keywords: school improvement, education policy, education reform, equity, quality, Shanghai education, China

Introduction

In 2009, Shanghai participated in the PISA test and ranked first in the world, arousing global attention to education in Shanghai. Although such large-scale assessments (LSA) have been questioned (Yuan & Zhao, 2019), the results can be a valuable resource for studying trends and evolving systems in education (Johansson, 2016). Some scholars turned their perspectives to the government's response to PISA. Tan (2019) examined how Chinese education officials interpreted and utilized selective information from PISA to legitimate the initiatives in Shanghai. One of the initiatives was the New High-Quality School project (NHQS project), which was launched by the Shanghai Municipal Education Commission (SMEC) in 2011. The rationale behind the NHQS project was more than a response to PISA. What we can learn from the NHQS project is the strategy of education reform adopted by Shanghai, that is, the pursuit of a balance between quality and equity of education.

To better understand the NHQS project, reference to the experience and practice in other contexts is necessary. In the United States, where the education system is relatively mature, a similar project called the National Blue-Ribbon Schools program (NBRS program) was proposed by the United States Department of Education in 1982. Both projects were not the mainstream policies of the governments, but rather an exploration and encouragement of high-quality education. Therefore, we attempt to compare characteristics of the two projects, in

order to better understand what Shanghai has done in the pursuit of a balanced education of equity and quality. Our main research questions are as follows:

(1) What are the characteristics of the new high-quality schools in Shanghai?
(2) How does the NHQS project drive to school improvement in a balance between quality and equity?

The background of the NHQS project in Shanghai

With the development of China's economy, society and education popularization, the expectation of education has changed from enlarging educational opportunities to achieving quality education. In 2019, the Chinese central government officially issued a long-term educational development plan entitled, *China's education modernization 2035* (Ministry of Education of the People's Republic of China, 2019). As the achievement of high-quality and equitable compulsory education is one of the development goals in this plan, all provinces and municipalities have been reforming their education sub-systems responding to such a call.

The NHQS project in Shanghai is an exemplified school improvement endeavor. Yin (2012), the Deputy Director of the SMEC at that time, pointed out that the PISA 2009 results showed that some ordinary schools had been transformed successfully into quality schools, without additional resources from the central government. These schools had created profound cultural heritage that lifted the standard of basic education in Shanghai. Therefore, the SMEC launched the NHQS project in 2011 to study the growth trajectory of these successful public schools. The aims of this project were to examine the mechanism of how these ordinary schools had turned around into high-quality schools and to promote the successful experience of school reform. Another rationale behind this project was to explore how the government could achieve equity in education, in addition to the pursuit of quality in compulsory education.

As Shanghai is open to globalization, the traditional Confucian ethics and values of collectivism, trust, and honesty in education have been competing with those so-called new values of market, choice, competition, efficiency, and accountability (Pang & Wang, 2017). The NHQS project was a test of the policy that aimed at cooling down the "choice fever" (schools competing for quality students and students competing for quality schools) in urban areas. Therefore, in the certification for new high-quality schools in Shanghai, both equity and quality became both important criteria in assessment.

In 2011, 43 primary and secondary schools in Shanghai were selected and nominated as project schools. In order to radiate quality educational resources and experiences through cluster innovation, the SMEC launched the *Three-year Action Plan for New High-quality School Cluster Development in Shanghai (2015-2017)* in 2015. The plan aimed at that, by 2017, the number of schools in the new high-quality school clusters would be expanded to about 250, covering about 25% of the public schools in Shanghai (SMEC, 2015). From 2015 to 2020, the SMEC issued other policies that reinforced at achieving a balance between quality and equity of education in Shanghai (SMEC, 2020). The main strategy in the reform is to enhance cluster development among schools, in which almost every school in Shanghai is put into a group. Through school grouping, educational resources can be shared from

high-quality schools to weak schools. Different from the way of resource input and investment in the past, schools in the NHQS project were expected to deploy resources sustainably. That is, the NHQS project has its uniqueness and importance in testing the strategy of how to create quality education as the premise of equity. Therefore, it is significant to study the policy in such reform and to identify what render new high-quality schools in Shanghai.

Research methods

Our research team visited four NHQS schools, including two primary schools and two middle schools. The participants of the study were the principals and teachers in the NHQS project. Qualitative data were collected by face-to-face, semi-structured interviews with the principal and 4-6 teachers in group within each school. Most interviews lasted around one hour and were conducted in offices or meeting rooms in the project schools. The interviews aimed at exploring their strategies of school improvement and their personal views of the NHQS project. We asked about the schools' history, improvement processes, successful factors, and visions of education in Shanghai. For the National Blue-Ribbon Schools (NBRS) in the USA, we analyzed the submitted statements in their application materials in competing for the award of NBRS.

Framework for analysis

Based on an analysis of theories and case studies in the field of school improvement, Reezigt and Creemers (2005) proposed a comprehensive framework for effective school improvement. It shows that the concept of an improving school is firmly embedded in the educational context of a country and effective improvement requires school-level processes. Drawing on this framework, we analyzed the available data in the following four aspects: (a) context, (b) improvement culture, (c) improvement processes, and (d) improvement outcomes.

Context

In China at present, equity is highly emphasized and the government has great power to achieve the intended goals. School choice is limited by *hukou* (residence in a school district) and the "choice fever" is considered as a problem that threatens education equity. In 2020, the policy of the *Synchronous Enrollment of Public Schools and Private Schools (gong min tong zhao)* has been fully implemented, that intended to weaken the competitiveness of private schools for more able students. In the education reform in Shanghai, the district education bureaus were urged to enforce the policy of school enrollment which allowed schools to admit children only from their own communities. Principals and teachers were reminded that quality education are not the results of competing with other schools in enrolling more able students, but that schools should emphasize education for all and schools should hold ultimate responsibility for the families in the community. As Principal Zhang said,

> *We want to turn a school that in their eyes is not good enough into a quality school. We always seek to provide students from the average families with a curriculum that*

would enhance their effective learning experience and that would cater for their individual growth.

In this context of the reform policy, cooperation among schools is encouraged, while excessive competition among schools is not promoted. The SMEC set up new high-quality school clusters, with one NHQS project school shared their successful experiences with around 10 other ordinary schools within a cluster, and led them to develop concurrently with a variety of activities around different themes of school change.

In this way, each school can learn from the NHQS project school for new ideas and all other schools can develop on their own, without having attended to centralized directives from the SMEC. (Principal Fan)

In America, there are different types of schools that suit the needs of families from different backgrounds. Freedom of school choice for parents has created strong competition among schools. To render schools more adaptable to the needs of families, the government has given schools more autonomy and strengthened accountability for them (Elwick, 2017). Principals have owned much autonomy in curriculum, personnel, and finance while under immense pressure to improve the school's ranking in the district. The vitality of schools is stimulated, but at the same time, school choice brings about the consequences of stratification of schools and mostly benefits those advantaged families (Ben-Porath, 2021).

Improvement culture

In general and everywhere, school changes are initiated by governments rather than schools themselves (Rosenblatt, 2004). However, schools or teachers can take improvement initiatives spontaneously. In both the NHQS project and the NBRS program, the school leaders and teacher groups had strong internal motivation to improve the quality of school education. Putting aside ideas such as competition, their belief was to offer children the best education. This belief allowed them to continuously improve their teaching or management and strive for excellence.

The leadership of the principal does matter for building an improvement culture.

As a principal, first I have to figure out what kind of school I want to run. Then I would find out what I am lacking and request the Education Bureau for extra funding or personnel support. That is, to know what I want to do is important. (Principal Zhang)

With a strong desire to improve, principals in the NHQS schools took actions spontaneously to gain extra resources for school improvement, which supported teachers' willingness and attitudes to change.

The headmaster always emphasizes professionalism and strives for excellence. Once she has found a direction for school reform, she spares no effort to invest in all kinds of resources. She has high expectation and demands on the teachers, as well as, offers support and encouragement. (Teacher Tang)

As the Job Demands-Resources model (Bakker & Demerouti, 2007) illustrates, appropriate resources can increase people's motivation and potentials, especially when the job is demanding.

Nowadays, parents are more educated and children are now seeing things differently than ever before. The internet has provided a wealth of information resources for all, making online learning and lifelong learning a reality. So that, the

school culture should be kept abreast with the new expectations from students and parents. In the words of Teacher Lu,

> *Because of the changes of the times, for teachers, the 'passing line' of being a good teacher or providing a good education has changed.*

Improvement process

In addition to internal efforts, the nominated schools in the NHQS project can receive guidance and support from the Shanghai Research Centre for New High-Quality Schools and from district bureaus. They provided the principals and teachers of the project schools with sufficient opportunities and channels for professional development, training, exchanges and exhibitions (SMEC, 2015). Meanwhile, professional learning communities are created within schools, among schools, and between practitioners and researchers. The principals of the four NHQS, we visited, claimed that, they now have a New High-Quality Schools Alliance. Schools are no longer alone in their educational reforms or work behind closed doors. Further external forces of change also exist at the school level, such as, schools can invite external experts to support school improvement and guidance in change. The reform finally happens at the team level and the subject group level as well. When a school in the NHQS project has succeeded in certain endeavors, they will share their experiences to other schools within the group and disseminate the successful practices to other groups of NHQS schools too. Therefore, the NHQS project is not only a tool of certification, but also a planned improvement project under the guidance of the government in Shanghai.

As to the NBRS program in the United States, it identifies several hundred outstanding schools annually and celebrates their school excellence, turn-around stories, and how they have worked to close achievement gaps. The NBRS Award is both a high aspiration and a potent resource of practitioner knowledge. These schools serve as examples of successful continuous improvement for other schools throughout the nation. Their successful achievements are also posted on the U.S. Department of Education's website and shared to the public (United States Department of Education, 2021). The main characteristics of the NBRS program is that school change is from within and there is no external intervention. The NBRS program is more of an award encouragement and experience promotion.

Improvement outcomes

Reezigt and Creemers (2005) divided improvement goals into two types: goals that are explicitly written in terms of student outcomes and goals that are focused on change. *Green Indicators* for the primary and secondary students in Shanghai are used as the evaluation criteria for nomination to the NHQS project, which include 10 aspects: (i) students' academic level, (ii) learning motivation, (iii) academic burden, (iv) teacher-student relationship, (v) instruction methods, (vi) the principal's curriculum leadership, (vii) students' socioeconomic status, (viii) students' moral conduct and behavior, (ix) students' physical and mental health, and (x) student progress across multiple years (SMEC, 2011). It is apparent that student's academic achievement is not the single indicator for main consideration. This project emphasizes a holistic development of students and pays more attention to education equity. In the eyes of the Shanghai principals and teachers,

schools have never been examination factories. (Teacher Zhang)

Shanghai is an open-minded city in the sense that academic scores are important, but not the only indicator for student performance. Other areas of development, like art, technology, and sports are also very important and never neglected. (Teacher Huang)

Most principals and teachers in the NHQS project value the practical changes brought about by the reforms, which include the transformation of the classroom climate and the development of teachers' professional competencies.

In contrast to the NHQS project, the NBRS program has set two categories of awards: Exemplary High Performing Award and Exemplary Achievement Gap-Closing Award. Exemplary High Performing Award are for those schools that have the state's highest high-school graduation rates and the highest achieving students (the top 15%) in English and Mathematics, while Exemplary Achievement Gap-Closing Award are for those schools that have made the greatest advancement (top 15%) in closing gaps in subgroup achievement in English and Mathematics over the past three to five years. Both are measured by state assessments or nationally normed tests (United States Department of Education, 2021). It shows that the main criterion for evaluation for the awards is the absolute achievements of students or the degree of narrowing of the gap between students' achievements in the United States.

Conclusion

This paper aimed at reviewing the NHQS project which was launched after Shanghai had been ranked first in PISA 2009 and exploring how Shanghai education has attended to a balance between equity and quality in school education. Through an analysis of the policies issued by the SMEC in Shanghai, we found the NHQS project have focused more on the creation of network resources rather than deploying of existing resources. Further, the government in Shanghai has worked with the project schools to define the meanings of high-quality schools. In the past, high-quality schools were always regarded as the key schools which had high reputations, rich resources, and high enrollment rates of more able students. Nowadays, the new high-quality schools are no longer the key schools or selective schools. Any school that can perform well under the standards of the *Green Indicators* and can satisfy students' and parents' needs will be nominated as NHQS. This project advocates a balance of quality and equity as its advocacy in the new era.

We compared the NHQS project in Shanghai with the NBRS program in the United States, using a comprehensive framework for effective school improvement. We visited four NHQS project schools in Shanghai for field work and data collection about the principals' and teachers' views of the NHQS project and their experience of how to attend to a balance between quality and equity in school education. We found that the culture of cooperation and mutual assistance among NHQS schools is strong, especially through cluster development. To chase a balance between equity and quality, the strategy taken by the government in Shanghai is to turn around the quality of weak schools, so that every student can receive good education. From the field work in these schools, we can see that principals and teachers in Shanghai have inherent and strong motivations for improvement. They recognize and espouse the philosophy of education advocated by the Shanghai

Municipal Education Commission, which emphasizes the importance on the holistic development of all children.

In sum, Shanghai's NHQS project has involved more participation and guidance from the central government and is a new attempt to explore school improvement. Although the use of green indicators in assessing school performance goes beyond the previous use of student academic score as a single indicator, the project may still encounter some difficulties in reality. For example, competition among students and among schools never ends. Therefore, the philosophy in balancing between education quality and equity requires a wider propaganda and needs to gain all stakeholders' understanding and recognition. Although the NHQS project is experimental in Shanghai and not in a big scale, its influence on school reform in China is evident. There have been local governments in some other provinces and cities in China that have learnt from Shanghai's experience and set up their own NHQS projects.

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Overview of the Home-schooling Phenomenon in Bulgaria

Abstract

The theory and the practice of home-schooling has adherents and opponents, but the research data shows that this phenomenon has increased significantly over the past years in many countries and in different regions around the world. A growing interest from families willing to home-school their children is also observed in Bulgaria. This paper aims to explore the home-schooling landscape in Bulgaria, including the legal framework and most common practices, and to analyze some of the results of home-schooling for selected Bulgarian families, who have made this choice. There is little scholarly research and official data on elective home education in Bulgaria and this paper provides an overview of this alternative education practice through a study of the available literature, legislation texts and analysis of in-depth interviews conducted with home-schoolers aged over 16 years. Despite the fact that home education generally meets a certain level of reluctance, the legislation in Bulgaria has evolved in the past years and allows families to home-school their children through an independent form of education, under the oversight of the government. Home-schooling in Bulgaria is a quite recent phenomenon. A small number of individuals have now finished their home education and have either joined a higher education institution or the job market directly. Evidence from the conducted interviews shows that these Bulgarian home-schoolers thrive and perform well, not only in their respective studies and/or jobs, but also in the society in general.

Keywords: home-schooling, elective home education, alternative education, Bulgaria

Introduction

Home-schooling is paradoxically an old and a new phenomenon in education, depending on the meaning of this term. If we look back in the educational traditions in the past centuries, mandatory public schooling is a relatively recent practice in education, as prior to the existing of public and private schools, the education process used to occur within the family (Porumbachanov, 2018). Home-schooling could most commonly be defined as the education of school-aged children led by the parents outside of schools. The understanding of home-schooling varies widely and, in some cases, home-schooling can be likened to private schooling. In other cases, for some families, it is argued to be an alternative education practice, which parents take up in order to provide high quality education to their children, not provided by formal schooling practices. For other families, home-schooling remains the only available option to face some psycho-social issues, or to meet the ideological requirements that the parents have for their children.

This paper focuses on the actual practice used by parents in Bulgaria, who home-school their children and provides a picture of the current home-schooling landscape in Bulgaria through analysis based on available research, legislative acts and in-depth interviews conducted with home-schoolers. The combined insights gained from the available research, interviews and newspaper articles provide a

rough estimate of how many children in Bulgaria are home-schooled. This is also an attempt to draw attention to the results of Bulgarian elective home education, as at present research on this topic is limited. However, interest is increasing from both defenders and disputers of this practice and it remains a controversial issue raising many questions requiring answers.

Legislative landscape for home-schooling in Bulgaria

School education in Bulgaria is mandatory between ages 7 and 16, according to the *Pre-school and School Education Act of 2015* (Ministry of Education and Science, 2015), which regulates the educational standards in the system of pre-school and school education. Despite the fact that home education is not mentioned in the *Pre-school and School Education Act*, the law does not prohibit the home-schooling practice.

Before 2015 home-schooling in Bulgaria was considered illegal. However, opposition from the home-schooling community resulted in a fight for their constitutional rights, to choose the education format that they considered the best for their children. The legislation has evolved in the past years to adapt to the requests of parents, willing to home-school their children under certain conditions and supervision from the governmental institutions in charge – the education inspectorates. The Ministry of Education and Science (2015) *Pre-school and School Education Act* allows parents and children the option to choose between a certain number of these. The education "at home" was allowed under the independent form of education. This format is subject to oversight by the educational system controlling bodies and the students have to be enrolled in a formal school, which allows this format.

The government does not provide financial support for those families, but ensures a certain level of control through the regional education authorities and requires knowledge validation, based on the curriculum approved by the Ministry of Education. Although the state authorities allow the independent education, there are families who find ideological or religious lacks in this format and prefer enrolling their children in international home-school programs, in most of the cases provided by schools based in countries with long traditions in home-based education. Defendants of the home-schooling practice, who do not choose the independent education form argument that according to the Human Rights Convention and other legislative supranational texts, the parents have the fundamental right to determine the education of their children. Brian Brown, President of the World Congress of Families said in an interview during the GHEC 2018 in Moscow, that "any country that moves in the direction of limiting that is (…) undermining human rights" (Brown, 2018, video).

In many countries, with long traditions in the home-schooling practice, but also in Bulgaria, there are different forms of home-schooling which parents adopt. In Bulgaria several practices may be observed: an independent form of education, through enrollment in a public school; home-schooling using different remote schools, based abroad; home-schooling cooperatives; hybrid home-schooling using a natural learning approach (in some cases known as unschooling); learning with private teachers, learning centers and other institutions.

Home-schooling in Bulgaria: reasons to exist and to grow

The information provided in some newspaper articles about the number of families engaged in home-based education, although unofficial, shows a vast increase from 70 to 100 families in 2014 to more than 1000 families in 2020. "Non-formal education and self-study do not fall within the scope of the education system according to the used definitions of ISCED 2011" as per the NSI's report *Education in the Republic of Bulgaria* (NSI, 2021, p. 8). This explains the lack of official data on the number of children engaged in home-based education in Bulgaria. Although there is no official statistical data on the number of home-schooled individuals, as home-schooling can be organized in different formats, the current estimates suggest that the number of students educated at home in compulsory schooling age is approximately 15000 students in 2020, registered within the scope of the independent form of education, according to the data provided on the National Network for Children (2018), and approx. 1000 students enrolled in other home-schooling programs. This accounts for roughly 2% of the number of the students of school age. In this paper, I focus on the families who have deliberately chosen to home-school their children and aim to provide insights and to share findings on the results.

Different reasons exist for families who take the decision to home-school their children. They are complex and, very often, combined, but generally related to the dissatisfaction with standard schools. In some cases, it comes from the inability of local schools (public or private) to address children's special educational needs or to provide a safe, violence-free environment for the pupils. Other parents take up on home-schooling in order to provide education which fosters the religious or moral position of the family. Another common motivation for parents to home-school their children appears to be pedagogical dissatisfaction or higher knowledge and competencies development expectations, that these families assume cannot be met at school. Some parents' argument is related to the quality of the education at schools is focused on selective learning to pass a grade and not to develop specific skills, to acquire knowledge or to solve a specific problem. "It is distressing to see that the constant pressures on children, teachers and schools to succeed, are having a detrimental effect on learning and on the happiness of some of our children" (Hilton, 2020, p. 92).

Motivations and concerns about the home-schooling practices in Bulgaria

The motivations can be classified in pedagogical, ideological and socio-psychological reasons (Garkova, 2015). There seems to be a common belief amongst researchers that one of the primary motivations for families to home-school is religious, when parents consider their children cannot acquire theological knowledge or some ideological values in the formal schools (Olsen, 2008). However, the findings of Garkova's research rank first the pedagogical motivation for the parents. This statement is also confirmed in the self-reflective texts provided by the contributors to the book *Home-schooling in Bulgaria* (Porumbachanov, 2018).

Garkova observes that the defenders of the home-schooling practice are more likely to showcase the opportunities offered by home-based education, rather than the limits of this phenomenon (Garkova, 2018). On the other hand, the challengers would tend to focus on the negative aspects and outcomes of the home-schooling. In order to acquire a scientifically valid and productive overview of certain phenomenon there is a clear need to explore the alternatives and confront the facts.

Positive outcomes of the home-schooling practices

Some of the advantages of the home-schooling practice, summarized by Garkova are "individual approach to the student; individual training according to the child's abilities; achievement of better academic results; flexibility in the methods and materials used whether; training with materials and through activities applicable in real life…" (Garkova, 2013, p. 184). In addition, the interviewed home-schoolers identify other success factors, such as learning through problem solving of real-life situations and acquisition of transferable skills applicable in one's career and real life. Natural curiosity and interests could have more place to be explored and developed than in a school and children seem to be more involved in the study process as active stakeholders.

The results of the interviews conducted with the home-schoolers in the framework of this research confirm that the home education allowed them to gain time, as they skip the "waiting time" in class and could then focus on activities or subjects which not only they attended to or studied with interest, but also allowed them to gain transferrable skills, which are highly valued in the post home-schooling life namely, entrepreneurship, responsibility, high level of autonomy, self-awareness and sense of initiative.

Time management is one of the controversial skills which some of the interviewees considered as a positive outcome, but others suggested this could be an issue for the home-schoolers in life, as this skill seem to be highly impacted by the family dynamics, but also highly needed in "real life".

Concerns about home-schooling practices

One of the most commonly raised issues regards the social skills development of the home-schooled individuals. Probably one of the most frequent questions about the home-schooling is "What about home-schoolers' socialization?" and it comes with the assumption that home-schoolers do not know how to interact with other people. Investigations of social competencies show that home-educated children not only have no issues with socialization, but possibly socialize and adapt better to real life and citizenship than their counterparts in public schools (Carlson, 2020). Other alerts explored in the research is the quality of the education delivered "at home" when the parents are not professional teachers or pedagogy professionals. "Children are at serious risk of losing out on opportunities to learn things that are essential for employment and for exercising meaningful choices in their future lives" (Bertholet, 2020, p. 3). Another problem, which is not highly considered in the research studies, but could still have an important impact on the development and the results of the home-schoolers is the possible pressure on pioneer children, without any declared special needs and families, to perform and achieve high academic, extracurricular

and/or professional results. The fact that home-schooling is not well seen in Bulgaria in general, leads the home-schooling families to demand more from their children, in order to refute the common myths about the negative outcomes of home-schooling. According to some of the interviewees, a common issue that could arise in some situations is the perception of the child and later of the individual that the opinion of their parents is the only valid one, as there is no other validating institution. This could lead to vulnerability of some children to exposure to extreme religious beliefs and radicalization in some countries (Bongrand & Glasman, 2018), but there are no scientifically proven links according to the authors.

Research

In a recent study, conducted by Yale Child Study Center, published in the *Journal of Learning and Instruction*, the findings show that nearly 75% of the students' self-reported feelings related to school were negative (Moeller et al., 2020). This rate is significant and raises a question about the common practices and the reasons for the lack of enthusiasm, formal schools' students report.

Six in-depth interviews were conducted with selected members of home-schooling families in order to provide an overview of the home education phenomenon in Bulgaria. For the interviewed home-schoolers, who have switched from formal school to elective home education in their early school years, this seems to be true, because of the rhythm imposed and the strictly determined curriculum, which "students cannot escape, even if they are not interested in the matter", says one of the interviewees. "The closer students get to graduating from high school and entering the world of work, the less enthusiastic they feel about school" (Calderon & Yu, 2017). The home-schooled interviewees who answered the question, how they felt about their home-schooling years, responded in an exactly opposite way. Five out of six interviewees acknowledged that the more they advanced in the schooling years, the more they realized home-schooling had a positive impact on their development and enthusiasm about this educational practice and learning in general. One of them had always felt "happy and grateful" since the very start of the school years. For three of them, the earliest years were the most difficult, before they could actually become autonomous and manage themselves and the learning process without hands-on support from their parents. Students who started their education in a formal school needed more time to adapt to the rhythm of home-based learning than students who were home-schooled from the beginning. Four of the interviewed individuals envisage that they would like to educate their own children at home, although none of them is a parent yet. The other two respondents would either prefer to enroll their children in a private school, or potentially create a school or cooperative themselves, which could be a hybrid version between home-schooling and regular schools.

The analysis of the conducted interviews shows that individuals who went through home-based education socialize well and have no issue to interact not only with people of their age, but also with individuals of different ages and social status. This also allows most of them to acquire a maturity which is not measurable, but still very noticeable in the interviews. Each of the interviewed individuals is currently in one of the following situations: either enrolled in a higher education institution in Bulgaria or abroad, or have a job, or both. Five of the six interviewees

have not felt isolated during the home-schooling years, as the socialization with other individuals occurred very naturally through family and friends, neighbors, people met while doing external activities such as sports and/or art practice, private lessons, other home-schooling families and cooperative educational activities. Each of them has currently either a part-time or a full-time job, which allows them to contribute to their families' budget or to earn their living independently, whether they are currently studying or not. For most of them, having a part-time job was part of the education process which allowed them to develop professional competencies, social skills and a network of contacts. All of the students, who work, said that their employers are very satisfied and these statements confirm the forementioned research findings about the social abilities of the young interviewees.

Recommendations and conclusion

Overall, the number of home-educated children is rising in many countries, including in Bulgaria, which is only partially due to the Covid-19 pandemic, as an increasing number of parents are concerned about the online classes' delivery and the long exposure to screens, which research has proven to have negative effects on the child's brain development and wellbeing. Although there are different motivations and a wide variety in the education practices that the home-schooling families adopt, these practices are mostly perceived as an alternative to public education. Most of the parents, who take up elective home schooling, think they are able to provide a better education or a safer environment for their children at home. As home-schooling is a growing trend, which in some countries is not seen as alternative, but more and more mainstream (Carlson, 2020), attention should be brought to this expanding phenomenon.

One recommendation that can be made for the education authorities in Bulgaria, is to explore the feasibility of creation of bonds between schools and home-schooling families in order to allow home-schoolers to access elective courses or have access to specialized school and/or infrastructures (science labs and classrooms, gyms, music rooms etc.). This would not only be a way to enhance the quality of education home-educated children receive, but also allow the local authorities to get insight about the development of home-schoolers through the contacts with school teachers and other professionals, as one of the main concerns today remains the lack of school socialization of the children, who study at home.

However, as most of the interviewed home-schoolers say, home-schooling should not be regarded as an "ideal" educational practice and "is not for everyone". Each family should evaluate its dynamics before such a step is undertaken, as this is, surely, a premise for a greater freedom of choice, but also comes with a huge responsibility which should not be underestimated.

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Examining the Relationship between Exposure to English in Non-Language Classes and Motivation to Use English during Free Time Activities

Abstract

Due to the necessity of English knowledge for international education, business, and travel, students, parents, and educators have made English language learning a priority from an early age. However, traditional English as a foreign language (EFL) classrooms are no longer the only option. Types of classes which integrate language learning and course subject material are becoming more common throughout Europe and worldwide.

This study aims to investigate the relationship between students' participation in non-language (e.g., math, science, history) classes taught fully or partly in English and their use of English during free time activities. Data collected from a large-scale survey of 1,403 Czech lower secondary students from different types of schools is examined. About half of the students in the sample came from public or private multi-year grammar schools, which are generally prestigious and selective institutions. The other half of the students came from public or private basic schools. Findings suggest that students who participate in Content and language integrated learning (CLIL) and English as a medium of instruction (EMI) classes are overall more likely to engage in English-related free time activities and are significantly more likely to participate in activities that require active communication with other English speakers. Thus, these CLIL and EMI students use English in free time activities more often, which further supports their English knowledge and skills. These students also are more likely to hold a certificate in English and more likely to use English for active communication. In future research, the role that socio-economic status (SES) plays in free time activities and CLIL and EMI participation is examined, as it is possible that both activities are supported by highly-educated, high SES parents.

Keywords: CLIL, EMI, EFL, motivation, the Czech Republic

Introduction

Content language integrated learning (CLIL) and English medium of instruction (EMI) are two types of language teaching that have emerged in recent years. CLIL has flourished within the education systems of the EU countries in which there is an undeniable need for multilingualism in order to facilitate trade, travel, education, and general communication among citizens in the linguistically diverse member states (Pérez-Cañado, 2012). In many countries, such as the Czech Republic, schools offer bilingual classes as early as first grade (Smith Slamova, 2021).

CLIL consists of combining language teaching and subject course material so that language and subject matter content are taught in tandem. Such instruction requires teachers and materials that are able to facilitate the learning of both foreign language skills and subject course content material (Kao, 2022). Although this type of classroom situation can be challenging to achieve, students can benefit from

language learning in a more natural way than traditional EFL classes (Lasagabaster, 2011).

EMI is another type of language and content teaching that has become popular in universities, although depending on the English proficiency of students, it can be offered at any level of education. This form of instruction consists of presenting the content material in English without a focus on language learning specifically. Thus, students must already have a high level of English language proficiency (Reus, 2020). EMI differs from CLIL in that the language learning aspect is implicit, but because the material is delivered in English, students may learn new vocabulary from context clues or self-study (e.g., looking up unknown vocabulary). However, in CLIL settings, language and course subject matter are taught co-equally with an explicit focus on both types of learning (Reynaert, 2019). Additionally, within CLIL classes, the first language (L1) of students may be used at times to explain a concept (Kao, 2022), however in EMI, all content is delivered in English. EMI is used at many universities around the world that attract, or hope to attract, a variety of international students (Reus, 2020). Using EMI, instructors are able to deliver instruction to students from diverse language backgrounds simultaneously.

Parents and educators are aware of the need for students to learn English, and thus, the need for CLIL and EMI classes, in which English can be learned in a more natural setting (Reynaert, 2019) and potentially prepare students for tertiary education in an international setting, providing a vital learning opportunity. This is also true in the Czech Republic considering that Czech is not a widely spoken language, there is a great need for students to be prepared to communicate using English, not only academically, but in a wide variety of business and social situations.

Outside of school, naturalistic use of English has been found to have an impact on students' overall English learning (Chan, 2012). Students' use of English during their free time generally includes such activities as listening to songs, watching movies, reading books, using social media, playing video games, and chatting with friends and family etc., and as such, activates use of reading, writing, speaking, and listening skills. Research has found that students who use English during their free time activities demonstrate better oral skills and more vocabulary knowledge (Sundqvist, 2009) than their peers. Not only does free time use of English mean that students are being exposed to more versatile and natural uses of English, through movies, songs, social media, etc., it also demonstrates that students are motivated to seek out contact with English by their own directive (Chusanachoti, 2009).

Merikivi and Pietilä (2014) found that sixth grade CLIL learners in Finland had significantly larger average receptive and productive English vocabulary sizes (receptively 4,500 word families, productively 2,300) than their mainstream EFL counterparts (receptively 1,800 word families, productively 800). However, it was also found that CLIL students read more in English during their free time, and consequently, the students who reported reading in English in their free time were found to have the highest vocabulary sizes. These findings suggest that perhaps CLIL settings encourage more free time reading in English, and in turn, free time reading positively influences L2 vocabulary knowledge.

Nguyen and Stracke (2021) found that English learners mostly focused on test based goals and were dependent on their teachers during classroom learning.

However, free time activities using English allowed students full autonomy over their learning and in these types of activities, students focused more on development of their actual English skills, rather than preparation for a test or knowledge assessment. Chan (2012) had similar findings in that out of class English activities helped students internalize and understand the need for English learning and also improved their in-class performance. Both aforementioned studies found that increased language learning autonomy was associated with English-related free time activities. Thus, there is a need for English-related free time activities in order to bolster overall second language (L2) learning and motivation. As Chan (2012) suggested, the wide-spread use of English in popular culture can be harnessed by educators, students, and parents to promote an interest in learning English.

Research

The aim of this paper is to examine the relationship between attending non-language classes that are taught fully or partly in English and participation in English-related free time activities specifically. As such, the research question is as follows:

Is there a relationship between attending non-language classes taught fully or partly in English and students' use of English during free time activities?

Participants and data collection

Data was collected from 1,403 Czech students at the end of lower secondary education (ISCED 2) students, roughly 14 and 15 years of age. The sample group of students was distributed across the Czech Republic. Samples were taken from schools all in the Czech Republic within the following school types: basic public schools, basic private schools, public multi-year grammar schools, and private multi-year grammar schools. It should be noted that multi-year grammar schools, and private schools are over-represented in the sample when compared to the actual student population in the Czech Republic. Multi-year grammar schools, otherwise known as multi-year gymnasium (in Czech *víceleté gymnázium*), generally have more demanding curricula and require entry tests, as such they tend to attract high achieving students. Private schools of either type require higher amounts of tuition expenses than public schools, thus enrollment in private schools generally indicates a higher socioeconomic status. As such, a large proportion of the students in the sample have some privilege in terms of academics, socio-economic status, and access to language learning.

The students in the sample reported whether they were taught non-language subjects either partly or fully in English. This type of education includes CLIL and EMI classes. Students were specifically instructed not to include English as a foreign language (EFL) classes or English conversation classes when responding, but instead were given options of classes taught fully or partly in English such as mathematics, natural history, and physical education. Although the total sample of the large-scale survey included 1,403 students, out of this sample, 300 (21.4%) students reported that they had participated in such classes in the last year. For the purpose of this paper, we label these students as CLIL or EMI participants.

Engagement in free time activities using English was also measured. We classified free time activities as any activity not required as a part of academic

coursework. Students were asked about free time activities that they participate in for their own enjoyment, socialization, or personal growth etc. In order to measure this variable, students reported how many hours a week they participated in activities in English during their free time. They were also asked to indicate which type of activity (speaking, reading, writing, or listening) and to specify what the activity consisted of (i.e., reading articles online, speaking in video conferences, watching movies in English without subtitles, etc.).

Analysis

For the purpose of this conference contribution, the reported free time activities of students who had participated in CLIL or EMI classes (n=300) were compared with students who had not participated in those types of classes (n=1,103). We compare the results of the self-reported data from both types of students.

Findings

Overall, participants reported generally high levels of participation in English-related free time activities. This may be given by the fact that about half of the students in the sample are from multi-year grammar schools. Also about one third of the sample consists of students from private schools. Private schools typically put a large emphasis on educational elements, many of which in the Czech Republic focus specifically on language education.

On average for the entire sample, CLIL and EMI students reported using English more in all free time activities except listening to music. Over 95% of both types of students reported listening to music in English in their free time. However, this is not surprising considering music in English is wide-spread in the Czech Republic, with many radio stations only playing music from English speaking countries.

The biggest difference in reported free time activities was the percentage of students who speak English face-to-face. A rather large percentage (70.3%) of CLIL and EMI students reported speaking English in person for at least one hour per week, while only 50.2% of non-CLIL/EMI students reported the same. The percentage of students who use English in phone or video calls was also notable, with 64.7% of CLIL and EMI students reporting that they participate in this activity, whilst the percentage of non-CLIL/EMI students was 43.3% for this activity.

Data was also collected regarding English certificates and it was found that 43% of CLIL/EMI students held certificates in English, while only 11% of non-CLIL/EMI students had received some type of English certification. Thus, a sizable percentage of these students from CLIL and EMI classes have also undergone tests or some other type of certification process, in order to demonstrate their English proficiency levels, especially when compared with their non-CLIL/EMI counterparts.

Conclusion

Students who use English in free time activities have been found to be more motivated to learn English overall and have shown improvement in their in-class performance (Chan, 2012). The results of the study showed that a higher percentage

of CLIL and EMI students reported participating in English-related free time activities than their non-CLIL/EMI counterparts, and the activities with the most significant differences were those that required active participation with other English speakers such as phone/video calls and speaking face-to-face. Thus, it could be that CLIL and EMI students perhaps have more access to other English speakers due to socio-economic reasons (parents with higher education, travel opportunities, etc.). Previous research has found that Czech students at the primary education level from both public and private schools who were enrolled in CLIL English classes generally had more well-educated parents and higher academic aspirations despite school type (Smith Slamova, 2021).

Additionally, motivation to use English outside of school may also be affected by CLIL/EMI participation. Previous research has shown higher levels of L2 motivation among CLIL students when compared with EFL students (Lasagabaster, 2011; Doiz, Lasagabaster & Sierra, 2014). The findings from this contribution suggest that CLIL and EMI students are more motivated to seek out English-related activities during their free time, whether for self-improvement or simply the purpose of enjoyment. The fact that CLIL and EMI classes integrate language learning into other fields of knowledge can instill an understanding of the importance of foreign language knowledge for life and learning and not only for the purposes of passing a test (Chan, 2012). Additionally, Simons et al. (2019) found that students in Belgium who were enrolled in CLIL courses experienced increased self-confidence in their language skills, and were more likely to use the target language for active communication. In this way, these types of classes can motivate students to continue to learn in ways that are personally meaningful to them outside of school.

Regarding language anxiety, CLIL and EMI students could perhaps experience less English speaking and listening anxiety outside of the classroom due to the nature of their in-class language learning. However, Doiz, Lasagabaster and Sierra (2014) found that 12-13 year old students in CLIL classrooms initially experienced more language learning classroom anxiety than traditional EFL students, but this anxiety decreased with long-term exposure to CLIL. It is also reported that the findings of initially higher anxiety levels could also be attributed to the challenge of the content subject matter rather than being L2 specific. Simons et al. (2019) also found that students in CLIL courses initially experienced more foreign language anxiety, but that with time, the anxiety drastically decreased, especially anxiety about making errors in the L2. This study also found that parents of CLIL students reported that after CLIL exposure, their children were more likely to communicate in the L2 outside of class, for example, at home or while traveling abroad.

Findings from this research suggest that students who have attended non-language classes taught fully or partly in English are more likely to use English during their free time activities, which further supports the development of their English skills. These students are also more likely to hold a certificate in English and more likely to use English for active communication with other English speakers outside of school.

Recommendations for further research include studies on L2 anxiety levels outside of the classroom among traditional EFL students and CLIL/ EMI students, as well as research that examines the relationship between English-related free time activities and L2 motivation and achievement in the classroom.

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Gender Themes in Jeff Kinney's Diaries of a Wimpy Kid

Abstract

The paper reports on findings of a qualitative content analysis of four of the sixteen "novels in cartoons" books written by Jeff Kinney. Connell's theory of masculinity underpins this study. The aim of this paper is to answer the following two research questions: What are the most important gender themes in Kinney's cartoon diaries? Can teachers use Kinney's cartoon diaries to create an awareness of gender inequality? I identified the following gender themes that permitted hegemonic masculinities: bullying and violence, bravery, the importance of sport, gender relations and the tension of growing up in a matriarchal-patriarchal household. The study found that Kinney's books could be used as a point of departure to explain to children that the alpha male is not solely responsible for gender inequality and violence. The wimpy, seemingly innocent and helpless kid can also be the instigator of inequality between genders or within genders. The popularity and availability of Kinney's books make them an ideal vehicle for teachers worldwide to create a sensitivity for gender issues.

Keywords: children's cartoon novels, Connell's theory, gender inequality, hegemonic masculinities

Introduction

Adults write most children's books. Explicitly or implicitly, these authors convey their beliefs, thoughts and values to the young readers whether or not the intention is entertainment or education. Kim and Wee (2020, p. 364) write, "children's literature can be a powerful site for children to interact with the ideological, political and pedagogical viewpoints in society". Gooden and Gooden (2001, p. 91) expand on this point of view when referencing gender roles in society: "books are often the primary source for the presentation of societal values to the young child [and] are a powerful vehicle for the socialization of gender roles". Gooden and Gooden (2001) found that gender stereotyping in children's books has a negative impact on children's insights into women's role in society and at home and lowers girls' self-worth and career aspirations.

On the other hand, the archetypical male protagonist is often known for his "admirable physical and moral courage, outstanding athletic prowess, honesty and strict though cheerful adherence to a rigid code of honour that scorns backing down from a fight, discourages the outward display of emotions and rejects any form of snitching" (Robertson, 2011, p. 37).

Taber and Woloshyn (2011, p. 228) found that "even in books that appear to be challenging gender stereotypes, normalizations are often reinforced". I therefore decided to study children's books in which the male protagonist deviates from the "traditional boy-hero" (Robertson, 2011, p. 41), and embodies non-hegemonic masculinities. Male characters who, according to Myers (2012, p. 132), embody non-hegemonic masculinities and are not competitive, domineering or sexually

predatory. These males are emotional and gentle. Rather than ostracising femininity, they often "mark themselves in feminine ways" (Myers, 2012, p. 132).

In my discussion of four of the *Dairy of a Wimpy Kid*-books I will argue that notwithstanding the non-hegemonic representation of the protagonist, these books reinforce hegemonic masculinities. The aim of this paper is to answer the following two research questions:

- What are the most important gender themes in Kinney's cartoon diaries?
- Can teachers use Kinney's cartoon diaries to create an awareness of gender inequality?

Theoretical framework

Connell's theory of masculinity underpins this study. Most of the research on men and masculinities focus on the idea of hegemonic masculinity. According to Carrigan et al. (1987, p. 92, in Coles, 2009, p. 31) hegemonic masculinity is "a question of how particular groups of men inhabit positions of power and wealth, and how they legitimate and reproduce the social relationships that generate their dominance".

Hegemonic masculinity is thus a "form of masculinity that legitimates unequal gender relations between men and women, and among men" (Connell, 1995, p. 92). According to Dragowski and Sharrón-del Río (2014, p. 1), Connell recognises "the hierarchies and interrelationships between the hegemonic, subordinated, complicit and marginalized masculinities, and theorized that, in our society, hegemonic masculinities subordinates other masculinities". Boys and men use a variety of strategies, among others bullying and violence, to assert power over women and other men, and to normalise their domination (Mayeza & Bhana, 2021).

Research methodology

Four of the sixteen *Diary of a Wimpy Kid* "novels in cartoons" books, written by Jeff Kinney, and originally published between 2007 and 2021, were used as data for this study (cf. Robertson, 2011, for the use of literature as data). These books are freely available in libraries and bookshops in printed, e-book and audio format. According to the cover page of the 2021-novel, *Diary of a Wimpy Kid: Big Shot*, over 250 million books have been sold and translated into 56 languages. The universal appeal and availability of the books open up the possibility of teachers worldwide using these novels as point of departure to discuss gender issues.

I followed Henning et al.'s (2011) guidelines for qualitative content analysis to reduce, condense and group the content of the four diaries. Guided by the research questions and Connell's (1995) theory of masculinity I immersed myself in the data (the four diaries). I gave codes to different "segments or units of meaning" (Henning et al., 2011, p. 105). After that, related codes were categorised and thematically organised. It is important to note that the data are a mix of text and images/cartoons. To enhance the credibility and quality of my study, I chose quotes to support the data carefully and avoided generalisations.

Findings and discussion: Gender themes permitting hegemonic masculinities

Bullying

Bullying is characterised by the power imbalance between the bully and the bullied. According to the protagonist (Greg) bullying is a given during middle school due to this power imbalance: "You've got kids like me who haven't hit their growth spurt yet mixed in with these gorillas who need to shave twice a day. … And then they wonder why bullying is such a problem in middle school" (Kinney, 2015a, p. 3). The diaries provide examples of different types of bullying – verbal, public humiliation: "Barry Palmer, you still owe Bryan five dollars, you BUM!" (Emphasis in the original) (Kinney, 2015a, p. 165), shaming by mean, popular girls, "don't walk near our lunch table … you're not even cute!" (Kinney, 2015a, p. 173), student-on-teacher bullying, "Hey, Mr. Ira, you pooped your pants again" (Kinney, 2015a, p. 175), as well as Internet bullying, "…the pictures were posted all over the Internet" (Kinney, 2016, p. 60).

Despite being a victim of bullying, Greg had no hesitation bullying other children. He bullied the kindergarteners that he had to walk home, under the guise of having "some fun with the kids" (Kinney, 2015a, p. 180). Greg took pride in initiating the verbal abuse of one of his classmates ("I STARTED THAT") (Kinney, 2015b, p. 12). The protagonist deliberately and cruelly ignored his friend, Chirag (Kinney, 2015b, p. 56). Greg did not hesitate to use mudslinging to take down the opposing candidate during his campaign for treasurer of the student government. One of his posters read: "Remember in second grade how Marty Poster had head lice. Do you want him touching YOUR money?" Greg was also guilty of body shaming his neighbour's son who wanted to be a professional basketball player when he grew up: "THINK AGAIN, SHAWN! NEITHER ONE OF YOUR PARENTS IS TALLER THAN FIVE-FOOT-TWO, AND YOU'RE THE ONLY 200-POUND SIX-YEAR-OLD I KNOW!" (Kinney, 2015b, p. 80). Greg justifies his bullying: "Before you go and say I'm a bad friend for Chirag, let me just say that in my own defence I'm smaller than about 95% of the kids at my school so, when it comes to finding someone I can actually pick on, my options are pretty limited" (Kinney, 2015b, p. 56).

The central theme of *Diary of a Wimpy Kid: Rodrick Rules* is Rodrick's relentless physical and verbal bullying of his younger brother, Greg. The protagonist is a helpless victim: "Rodrick can pretty much treat me any way he wants, because he knows there's nothing I can do about it" (Kinney, 2015b, p. 24). Greg was elated when his parents told him they were expecting another boy: "After all those years of getting pushed around by Rodrick, I was definitely ready to move up a notch on the totem pole" (Kinney, 2015b, p. 41). Unfortunately for him "Mom and Dad have always been SUPER protective of Manny, and they won't let me lay a finger on him, even if he totally deserves it" (Kinney, 2015b, p. 41).

While his older brother bullies Greg, Greg bullies his friend Rowley: "I guess I kind of felt sorry for Rowley, and I decided to take him under my wing. It's been great having him around, mostly because I get to use all the tricks Rodrick pulls on ME" (Kinney, 2015a, p. 20). The protagonist verbally, physically and emotionally

bullies his friend. He even let Rowley take the blame for his wrongdoings (Kinney, 2015a).

Power imbalance between the bully and the bullied is fundamental in bullying. Therefore, it is understandable that one of the aims of the protagonist was to protect himself from bullying. He believes that one's popularity among fellow-students, physique and involvement in student government will safeguard him against bullying and gives him power over the football "jocks" (Kinney, 2015a, p. 44). Greg therefore spends time in a makeshift and a real gym, reads about wrestling, runs for the position of treasurer and volunteers for the position of safety patrol officer.

Violence

Violent confrontation between males is important in cementing the alpha male's dominance over other males. Reading the books reveals that the protagonist was often the victim of attacks by bigger boys. The diagram accompanying Greg's explanation why he prefers to call the diary a "journal" has a big boy punching Greg and calling him "SISSY!" (Kinney, 2015a, p. 183). It is important to note that Greg's cocky demeanour is often the reason why older or bigger boys chase or attack him. A point in case was the protagonist's description of how senior students, whom he and Rowley mocked and leered at during Halloween, chased them. The two boys took refuge at Greg's grandma's house until the coast was clear. A few months later, the boys caught up with Greg and Rowley: "Before we could make a run for it, we had our arms pinned behind our backs" (Kinney, 2015a, p. 210). The teenagers forced Rowley to eat a piece of "cursed" cheese that had been lying on the basketball court for months. Greg escaped a similar fate by telling the teenagers that he was allergic to dairy products (Kinney, 2015a, p. 215).

Despite his smug demeanour, the protagonist did not know how to fight. He therefore preferred to run for his life or hide the moment he smelled trouble. The following extracts from the diary highlights Greg and his friend's cluelessness when it comes to fighting. A heated verbal confrontation between Greg and Rowley regarding the intellectual ownership of cartoons attracted a crowd shouting "FIGHT! FIGHT! FIGHT" (Kinney, 2015a, p. 206). The protagonist emphasises the culture of violence at the school: "The kids at my school are ALWAYS itching to see a fight. Me and Rowley tried to walk away, but those guys weren't going to let us go until they saw us throw some punches" (Kinney, 2015a, p. 206). Neither Greg nor Rowley was in a "real fight before: I didn't know how I was supposed to stand or hold my fist or anything … Rowley … just started pacing around" (Kinney, 2015a, p. 207). The crowd dissolved at the arrival of a group of teenagers.

Bravery

The protagonists of children's books are usually brave and adventurous. Greg, however, is often portrayed as a scared boy who did his utmost to avoid confrontations or scary situations. During his class's trip to Hardscrabble Farm, he was for example petrified when he heard about Silas Scratch, who lived in the forest "and grew his fingernails really long" (Kinney, 2016, p. 135). Circumstances on the farm, however, seemed to force the frightened protagonist to dig deep and act as a leader: "Once it got DARK … the guys in my group were too scared to leave the fire to help me collect sticks. … So I went to look for firewood by myself" (Kinney,

2016, pp. 206-207). The latter example is one of only a few identified in the analysed data not depicting Greg as a clumsy and frightened boy.

Importance of sport

Hegemonic masculinity plays a fundamental role in sport due to the overemphasis on winning. According to English (2017, p. 183) hegemonic masculinity "marginalizes those that do not possess specific traits". The first paragraph of *Diary of a Wimpy Kid: Big Shot* leaves the reader with no illusions about the lack of athleticism of the protagonist: "I've heard that athletes are born with special genes that make them good at sports. Well, whatever those genes are, I guess I was born WITHOUT them" (Kinney, 2021, p. 1). According to Greg "Mom's always saying that everyone who's part of a team has an important role to play. But when it comes to sports it seems like my job is to make everybody ELSE look good" (Kinney, 2021, p. 1). The protagonist realises the importance of sport for men (his father): "I feel bad that I've never been good at sports, because I think Dad was hoping I'd be a star athlete" (Kinney, 2021, p. 9). Yet, he is upfront about his dislike of sport: He hated the physicality, "The thing I hate the most about running is that it makes you SWEAT" (Kinney, 2021, p. 102) and the aggressiveness thereof, "Our team was ready to fight for REAL" (Kinney, 2021, p. 158).

Greg's efforts on the sports field and in the swimming pool read like a comedy of errors: He did not get last place in the 50-meter sprint, because one of the athletes fell flat on his face. During a baseball match, he threw the ball through his team's net (Kinney, 2021). Greg's father forced him to join the swim team, because "Dad's got this idea that I'm destined to be a great swimmer or something" (Kinney, 2015b, p. 2). Greg did his utmost to skip swimming classes: He unsuccessfully tried to convince his dad to let him do Water Jazz with a group of elderly women. His only way out of the swimming classes was to "hide out in the locker room until practice was over" (Kinney, 2015b, p. 2). Greg's efforts to learn wrestling was a fiasco: After the school's Physical Education teacher announced that the boys would do a wrestling unit for six weeks, Greg rented a few video games "to learn some moves" (Kinney, 2015a, p. 78). With shock, Greg realised that the wrestling the teacher taught "is COMPLETELY different from the kind they do on TV". Greg was paired with Fregley – "the only kid light enough to be in [his] weight class". Fregley was too good for Greg: "he pinned me every which way you could imagine" (Kinney, 2015a, p. 83). Greg was in an inevitable position – he would have to fight Fregley every day for six weeks.

Gender relations

The diaries are about boys for boys. Although girls play a minor role in the diaries, it is important for the protagonist to emphasise his heterosexual orientation: "I have ALWAYS been into girls" (Kinney, 2015a, p. 7). It is thus important for him to be popular among the girls. Relationships with girls and popularity among them are, according to Greg, forever changing. During elementary school "the deal was, if you were the fastest runner in the school, you got all the girls … nowadays, it is a whole lot more complicated. Now it is about the kind of clothes you wear or how rich you are or if you have a cute butt or whatever" (Kinney, 2015a, p. 6). Greg figures that he is "somewhere around 52nd or 53rd most popular this year. But the

good news is that I'm about to move up one spot because Charlie Davies is above me, and he's getting his braces next week" (Kinney, 2015a, p. 7).

Despite the protagonist's need to be acknowledged and admired by girls, his conduct towards them is humiliating and arrogant. The following two examples typify the power relations between the dominant male and the subordinate women, as well as the male's objectification of girls.

Greg had a bone to pick with Patty Farrell when she snitched on him during a Geography quiz. Greg signed up for the role of a tree in the school's production of *The Wizard of Oz*. This will give him the opportunity to throw apples at Patty, who plays the part of Dorothy. Greg got his revenge: "Seeing Patty standing [in the wings] reminded me why I signed up to be a Tree in the first place. … Pretty soon, the rest of the Trees started throwing apples, too. … Somebody knocked the glasses off of Patty's head, and one of the lenses broke" (Kinney, 2015a, pp. 112-113). Greg was quite thrilled with Patty's public humiliation: "I just hope that everyone who came to see the play was as entertained as I was" (Kinney, 2015a, p. 113).

In an effort to escape from his brother's wrath, Greg tried to hide in the bathroom of the old age home while visiting their grandfather. To his embarrassment, he was stuck in the women's bathroom for an hour and a half. Security escorted the "peeping tom" out. With time "the story went from me accidentally walking into the women's bathroom at Leisure Towers to me infiltrating the girls' locker room at Crossland HIGH SCHOOL" (Kinney, 2015b, p. 213). This resulted in boys congratulating him, calling him the "Stealthinator", and giving him high fives. "And for the first time ever I knew what it felt like to be the most popular kid at school" (Kinney, 2015b, p. 215).

Growing up in a matriarchal-patriarchal household

The protagonist grows up in a household that is neither matriarchal nor patriarchal. Greg's mum is more than a homemaker and mother – she is an activist petitioning for people "to stop using their phones and electronic gadgets for forty-eight hours" (Kinney, 2016, p. 3), a substitute teacher (Kinney, 2015b), and a baseball coach (Kinney, 2021). When Greg asked for a Barbie Dream House for Christmas when he was seven, his freethinking mom said "… it was healthy for me to 'experiment' with whatever kind of toys I wanted to play with" (Kinney, 2015a, p. 117). His dad, on the other hand "told me to start my wish list over and pick some toys that were more 'appropriate' for boys" (Kinney, 2015a, p. 117). It was important for Greg's dad to support any "manly" activities. He thus gave his son a new weight set, "that must have cost a fortune", for Christmas (Kinney, 2015a, p. 126) and forced him to be part of the swimming team. It was important for Greg's dad that he "learn how to do things by MYSELF [otherwise] I'm not gonna be able to survive in the 'real' world" (Kinney, 2016, p. 26). Greg tells the readers that his dad "hates how Mom still helps me get ready for school in the morning. She picks out my clothes the night before, and she has a chart hanging in the kitchen to help me stay on track" (Kinney, 2016, p. 26).

Conclusion

The four diaries that I used as data for my study tell the story of a small, clumsy, often cowardly and ineffective protagonist. Despite being subjected to verbal,

physical and emotional bullying, violence and humiliation on and off the sports field, the protagonist fails to be an empathetic and caring person. On the contrary, the protagonist found pleasure in humiliating those smaller than him, his loyal friend and members of the opposite gender. The diaries are full of paradoxes: the normalisation of heterosexuality is juxtaposed with femininity; the need for a man/boy to excel in sports is contrasted with an aversion to sweat, physicality and competitiveness; bravery and adventurisms as essential characteristics of the boy-hero is contrasted with faint-heartedness; and a strong-willed, freethinking mother is juxtaposed with a patriarchal father.

The popularity and availability of Kinney's books make them an ideal vehicle for teachers to create a sensitivity for gender issues. Teachers worldwide can use Kinney's diaries as vehicle to explain to children that the alpha male is not solely responsible for gender inequality and violence. The wimpy, seemingly innocent and helpless kid can also be the instigator of inequality between genders or within genders.

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Ubuntu: The Pursuit of an Indigenous Curriculum Reform Policy in Post-colonial Lesotho, Zimbabwe and South Africa

Abstract

School reform policy in post-colonial societies is often guided by Euro-American theory from the North. Theory generated in the South is marginalised as backward and unscientific. The present study, couched within the Southern Theory framework, disrupts the hegemony of Northern Theory by examining the implementation of the indigenous philosophy of Ubuntu in post-colonial Southern Africa. Ubuntu advocates for collective responsibility, sharing, humility and love for humanity – over selfish individualism. Employing critical discourse analysis, this qualitative desktop study reviews the implementation of Ubuntu as a reform policy to decolonise the school curriculum in Lesotho, Zimbabwe and South Africa. Findings indicate that curriculum reform policy is unequivocal in championing Ubuntu as the overarching philosophy for school reform. Although some aspects of Ubuntu are reflected in subject content and classroom pedagogy, a disturbing policy-practice gap was observed in existing literature. Some teachers in Lesotho, Zimbabwe and South Africa lack knowledge and values of Ubuntu. They are ill-prepared to promote this indigenous culture in their practice and do not show compassion and respect for learners. Some male teachers engage in illicit sexual relations with learners. To foster a decolonised Ubuntu-centred curriculum, teachers need knowledge on the selfless values of Ubuntu and how to nurture participatory democracy, respect, and love for humanity in their classrooms.

Keywords: Ubuntu, curriculum reform, post-colonial societies, indigenous knowledge systems, policy-practice gap, Southern Theory

Introduction

Curriculum reform in post-colonial societies is often guided by theory from the industrialised North (Chakraborty, 2021; Connell, 2007; Sigauke, 2016). Constructivism and outcomes-based education (alternatively called competency-based education) are popular as guiding philosophies for curriculum reform in Africa and other parts of the developing South. Socialist theory was popular in Latin America, Africa and Asia before the collapse of the Eastern bloc in the 1990s. Consequently, theory rooted in indigenous epistemology is generally marginalised as inferior to Northern Theory.

Colonialism nurtured formal education systems that serve the interests of the North, whilst undermining indigenous knowledge systems as backward, irrational, superstitious and unscientific (Chakraborty, 2021; Sigauke, 2016). However, the attainment of independence has seen policy reformers in the underdeveloped South challenging Euro-American centred education as alien to local needs. As a result, the decolonisation agenda has gathered momentum in the 21st century, amplifying the clarion call for the inclusion of indigenous theories in curriculum reform initiatives.

Ubuntu is one indigenous theory that has captured the attention of policy reformers in the South.

Ubuntu is a supra-national pre-colonial ideology, the Bantu people of sub-Saharan Africa shared before the advent of 19th century imperialism, which divided Africa into modern nation states. Ubuntu is a word from the Nguni language family (IsiNdebele, IsiSwati, IsiXhosa and IsiZulu) of Southern African meaning humanity, humility, kindness and generosity (Bangura, 2009). This ideology stresses co-operation, communitarianism, tolerance, and love for fellow humans. The Shona of Zimbabwe call this shared way of life 'Unhu'. The Sotho of Lesotho refer to it as 'Botho', the Chewa/Nyanja of Malawi and Zambia call it 'Umnthu', while the Banyambo of Northern Tanzania and the Baganda of Uganda term it 'Obuntu'. The Nguni say "Umuntu ngumuntu ngabantu" – translating to "a person is a person through other persons". Bangura (2009, pp. 35-36) summarises it: "To be human is to affirm one's humanity by recognizing the humanity of others in its infinite variety of content and form". This maxim is the cornerstone of African way of life and spirituality which recognises linguistic, historical and cultural diversity.

Despite the socio-politico-economic dislocations and distortions caused by colonialism, the Bantu of sub-Saharan Africa continue to share the values of Ubuntu. It an umbilical cord unifying the different Bantu groups. Ubuntu assumes the supremacy of collective solidarity over individualism by emphasising that "I am because we are, we are because I am" (Murove, 2014, p. 36). Without other people a Bantu is incomplete, underscoring the importance of self because of others.

In pursuit of the decolonisation agenda, post-colonial curriculum reform in Southern Africa adopted Ubuntu as the guiding philosophy for school reform, albeit at different times and in unique contexts. After Lesotho gained independence in 1966, it sought to reform its education in line with values of Ubuntu. Zimbabwe and South Africa also adopted Ubuntu as the overarching reform philosophy after independence in 1980 and 1994, respectively. Despite this common policy position, Ubuntu seems not to have gained much traction in the three countries' classrooms. School knowledge and classroom practice remain largely Anglicised and Euro-American-centric.

Purpose of the study

Theory generated in the South remains marginalised while Euro-American epistemology dominates academia and school reform. Education systems in Southern African countries remain grounded in Western theory marginalising indigenous knowledge. Since the attainment of political independence, the knowledge landscape appears not to have changed much in most post-colonial societies. Chakraborty (2021, p. 55) proposes that: "Theory has to be decolonized, de-prejudicized, de-jargonized…shorn off its usual halo in the academia and its self-patting, world-conquering pretensions". The tentacles of Northern Theory continue to hold Southern Theory captive.

This paper views Ubuntu as a counter-hegemonic ideology to the pervasive perpetuation of unequal epistemic power relations between the developed North and the underdeveloped South. Despite curriculum reform proclamations by governments in Southern Africa, indigenous knowledge systems remain peripheralised. Western epistemology dominates the theory of knowing. The

purpose of this paper, therefore, is to interrogate the extent to which curriculum reform in Lesotho, Zimbabwe and South Africa has attained the values of Ubuntu promulgated in official reform policy. Thus, the research question directing this paper is: To what extent are teachers promoting the values of Ubuntu in their classroom practice?

Ubuntu as a guiding philosophy

Serious efforts to pursue Ubuntu can be traced to Lesotho's adoption of the policy of Education with Production (EWP) in 1978. EWP promoted group solidarity, co-operation, and self-reliance among learners (Tlali, 2018). In 2000 Lesotho universalised primary education in pursuit of equality and social justice. "But proper implementation of these policy statements has, up to now, been frustrated by lack of logistical support and problems of attitudes among the people", notes Tlali (2018, p. 40). Lesotho's current Curriculum and Assessment Policy (CAP) "is derived from the Basotho philosophical statements of justice, equality, peace, prosperity, participatory democracy and mutual co-existence which underpin their way of life… these principles form the core of Basotho national consciousness" (MoET, 2009, p. 3). Ubuntu, therefore, is Lesotho's cross-cutting philosophy for current curriculum reform.

When Zimbabwe attained independence in 1980, the government rejected Ubuntu as the guiding philosophy for post-war reconstruction (Samkange & Samkange, 1980). It borrowed scientific socialism from the Soviet Union as the national reform ideology. But the fall of communism in Eastern Europe in the 1990s, forced policy makers in Zimbabwe to rethink the nation's philosophy for curriculum reform. Consequently, Zimbabwe's New Curriculum Framework 2015-2022 states that: "Every curriculum must have an underpinning philosophy and a set of principles which are ideals and beliefs considered important by society and educational practitioners... The country's values and principles are largely traceable to *Unhu/Ubuntu/Vumunhu* philosophy" (MOPSE, 2015, p. 13).

In South Africa the pursuit of Ubuntu as a guiding philosophy for political and educational reform is traceable to the collapse of apartheid in 1994 and the setting up of the Truth and Reconciliation Commission (TRC) in 1996. The TRC opened dialogue for peace, forgiveness, and unity among the previously warring races and groups. It also encouraged tolerance, humility, and love for humanity, in place of hatred and violence. Post-apartheid reforms in South Africa that include the Constitution of the Republic (Act 108 of 1996), the Outcomes-Based Education (OBE), National Curriculum Statements (NCS) to the current Curriculum and Assessment Policy Statement (CAPS) are all strongly informed by Ubuntu. These reform documents redress the inequalities of apartheid by promoting social justice. The CAPS document currently guiding curriculum reform is anchored in Ubuntu, as it seeks to "heal the divisions of the past and establish a society based on democratic values…by ensuring that the educational imbalances of the past are redressed and valuing indigenous knowledge systems…" (DBE, 2011, p. 5).

Curriculum reform policy in South Africa, as in Lesotho and Zimbabwe, is guided by Ubuntu philosophy.

Theoretical grounding

This paper is grounded in Southern Theory to disrupt the dominance of Northern Theory in post-colonial curriculum reform discourse. Connell (2007) developed Southern Theory to challenge existing global dependency on theory from the metropolitan North. Southern Theory draws from previously neglected indigenous knowledge systems and anti-imperialist struggles. It generates novel philosophical lenses that decolonise the curriculum and open space for indigenous theory to guide school reform. Ubuntu, a strand of Southern Theory originating from Africa, reframes curriculum reform from a non-Western perspective.

Southern Theory was found appropriate in illuminating this study because current curriculum reforms in Lesotho, Zimbabwe and South Africa seek to liberate education from Euro-American hegemony. The three countries are contributing to the decolonisation agenda by promoting Ubuntu as the philosophy for curriculum reform. Ubuntu is rooted in indigenous African knowledge systems and offers a paradigm shift from Northern Theory. Besides reducing dependency on Western epistemology, Southern Theory elevates the philosophy of formerly colonised people to competing status with northern epistemology.

Methodology

This qualitative desktop study uses words, concepts, and terminologies as evidence, instead of numerical data. An electronic search on Goggle Scholar was guided by three key phrases – 'Ubuntu in Lesotho', 'Ubuntu in Zimbabwe' and 'Ubuntu in South Africa'. Studies published between 2000 and 2021 on the implementation of Ubuntu as the philosophy for curriculum reform in the three countries were selected and critiqued in search for themes and patterns. Data collection and analysis took place concurrently and iteratively.

The research design for this study is critical discourse analysis (CDA). CDA is concerned with unequal power relations and injustice between powerful and powerless nations. Mullet (2018, p. 116) explains that "Critical discourse analysis (CDA) is a qualitative analytical approach for critically describing, interpreting, and explaining the ways in which discourses construct, maintain, and legitimize social inequalities". CDA assumes that knowledge empowers and frees the oppressed through self-awareness and reflection. This design guides the review of literature published on the implementation of Ubuntu as a counter hegemonic ideology for curriculum reform theory from the North.

Findings

Existing literature on Ubuntu as an overarching indigenous curriculum reform philosophy in post-colonial Lesotho, Zimbabwe and South Africa shows that the three countries are still struggling to institutionalise this Southern Theory in their classrooms.

Lesotho's snail-pace progress

Reform philosophy in Lesotho, as outlined in the CAP document, is anchored in Ubuntu policy statements of equality, social justice, peace, prosperity, mutual co-

existence and participatory democracy (MoET, 2009). But existing research (Lepotho, 2021; Mokolatsie, 2019; Tlali, 2018) shows a disturbing policy-practice gap. Despite policy proclamations to cultivate a culture of communitarianism and collective responsibility, curriculum practice in Lesotho remains largely Euro-American centred.

Missionary influence in schools and Christian ethos continue to undermine efforts to institutionalise Ubuntu in Lesotho schools. "Christian schools inculcated what was seen to be a new and better way of life, founded upon a blend of Christian Protestant teachings, [and] a strong belief in the progress of the West", notes Gill (1992) cited in Mokolatsie (2019, p. 54). Christianity promotes Western values while marginalising traditional African religion (an intrinsic component of Ubuntu) as superstitious and demonic.

Some teachers and learners in Lesotho reflect negative attitudes towards learners with special needs. Lepotho (2021, p. 100) found that "children with special needs encountered difficulty in social interactions with regular class peers and teachers. They were often laughed at or devalued… they experience low acceptance by peers, loneliness, rejection and bullying". Ubuntu does not encourage any form of discrimination because "your child is also my child".

Zimbabwe struggles to institutionalise Ubuntu

Policy declares that Ubuntu is the cross-cutting philosophy for Zimbabwe's New Curriculum Framework 2015-2022 (MOPSE, 2015). But efforts to 'Ubuntulise' the curriculum have mainly focused on Heritage Studies, History and Social Studies. However, some progressive indigenous language teachers are using traditional Shona novels to promote Ubuntu attributes of hard work, solidarity, honesty, and perseverance (Viriri & Viriri, 2018). Geography teachers are also utilising indigenous knowledge to conscientise learners on traditional methods for rainfall prediction and climate change mitigation. Risiro (2019, pp. 32-33) notes that:

> *When learners associate what is learnt from school with their experiences in the community, learning becomes more interesting… the integration of indigenous knowledge into the school curriculum contributes to the generation of new knowledge and the creation of a curriculum that is inclusive...*

Nonetheless, the implementation of Ubuntu in Zimbabwean classrooms remains a challenge to most teachers. Obstacles faced by teachers range from limited knowledge, resource shortages, negative attitudes, urbanisation and lack of indigenous experts. Risiro (2019, p. 35) observes that: "The teachers are not fully knowledgeable of the Indigenous Knowledge content to be taught due to a lack of documented sources to which they can refer". Teachers' meager salaries and a deteriorating national economy also contribute to the failure to institutionalise Ubuntu in Zimbabwean schools. Christianity, the major religion in Zimbabwe, overrides indigenous traditions like Ubuntu which are regarded as backward and unscientific.

Ubuntu and decoloniality in South Africa

In a study on the use of indigenous games to decolonise mathematics pedagogy in South Africa, Nxumalo and Mncube (2019, p. 113) established that: "The games

build a sense of collective and collaborative spirit by teaching African children to embrace the values of selflessness, commitment to the bigger picture and sharing in order to survive". These games discourage individualism and teach learners team spirit. However, the major setback is that not all teachers are conversant with indigenous games because most of them grew up in urban areas where the games are no longer played.

But a study conducted in the Eastern Cape Province by Chidziva (2021) shows that mathematics teachers are successfully integrating Ubuntu principles in their practice. Ubuntu values of solidarity, care, patience, and respect empower learners to support each other in learning mathematics. Passive learners participated during lessons because Ubuntu encourages "the active participation of community members for the well-being of that community" (Chidziva, 2021, p. 276).

Despite policy efforts to promote Ubuntu, some schools in South Africa are not doing much to cultivate the values of compassion and humanness. Some schools in KwaZulu-Natal were not providing adequate psychosocial support for orphaned and vulnerable children, because Ubuntu values of caring for the weak and marginalised are being eroded by westernisation and urbanisation (Makhonza et al., 2019). For instance, beneficiaries of a school feeding scheme complained that teachers often insult them with comments like: "If the way you eat here at school matched your performance, we were all going to be happy" (Makhonza et al., 2019, p. 13527). Another learner added that: "Teachers should treat us as human beings, even if we struggle in class we still need to be respected".

Discussion

A common thread emerging from this discourse analysis is that some teachers in Lesotho, Zimbabwe and South Africa lack knowledge and values of Ubuntu. They do not show compassion and respect for learners. Ubuntu teaches that: "It takes a whole village to raise a child"; "your child is also my child"; and "your pain is my pain" (Murove, 2014). However, some teachers neglect learners. Others physically and emotionally abuse them. One learner protested: "Some teachers cannot teach Ubuntu because they do not have the Ubuntu qualities, they propose love to school pupils" (Viriri & Viriri, 2018, p. 111). This unprofessional behaviour undermines Ubuntu in schools and discredits teachers as role models.

Critics question the wisdom of reviving Ubuntu arguing that it is rooted "in traditional community settings characteristic of the past and no longer possible in modern complex mobile communities" (Mokolatsie, 2019, p. 142). Core Ubuntu ethos like group consensus and prioritising community before individual interests, are difficult to realise. There appears to be some romanticisation of Ubuntu which glorifies the past while understating some negative practices prevalent in pre-colonial Africa – like social class inequalities, slavery, gender discrimination, and civil wars. However, proponents of Ubuntu, like Chidziva (2021), Mokolatsie (2019) and Sigauke (2016), argue that this humane culture is what contemporary societies (that are egoistic and deeply divided) need to reignite the love for humanity.

Conclusion

Despite teething problems, this study shows that the pursuit of Ubuntu as a unifying indigenous philosophy is rewarding for curriculum reform in post-colonial societies. By promoting a home-brewed Southern Theory, the implementation of Ubuntu as an overarching philosophy disrupts the dominance of Northern Theory in curriculum reform discourse. Future research can pursue how curriculum reformers and teachers can nurture Ubuntu culture in schools, so that all learners are cared for irrespective of social class background. Further studies can internationalise Ubuntu as an alternative Southern Theory that unifies a volatile and fractured world. Promoting Ubuntu can benefit humanity. Neglecting this humane philosophy catalyses segregation, distrust and hostility among communities and nationalities that are highly interdependent (but deeply divided) in a volatile 21st century.

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Reflections on the Training of Researchers in the Development of Educational Competences

Abstract

The training of researchers in the development of educational competencies is the central issue of this study. The process for research training is described. Training researchers in the development of educational competences is advocated and a profile of research skills developed. Training for research is different from training for the teaching profession. Researchers need diverse skills, and must be able to understand and tackle problems, as well as assimilating and generating new knowledge. Researchers must have skills that are logically linked. This integration of skills is made possible by a focus on competences, which can be thought of as a step forward in the development of the person, and as one of the best means that society has of preparing the researchers that are needed in the present day.

Keywords: training of researchers, educational competences, integration of skills, development, research process, components of competences

Introduction

In the globalized world of today, researchers need diverse competences, and must be able to understand and solve problems with multidisciplinary approaches, as well as assimilating and generating new knowledge. Researchers must go further and acquire skills that are logically interconnected. This integration is made possible by a focus on competences, which can be thought of as a step forward in the development of the person, and one of the best means for society to prepare the researchers that are needed for the present day.

Educational institutions must change in response to the need for competent researchers in various sectors of society. In this paper, the views of various authors about training researchers in the development of competences are analyzed and compared. The process of training a researcher in an environment that encourages the development of various educational skills is described.

Development

This new orientation changes the profile of the researcher, since he or she must carry out new administrative tasks, as employer or manager, which disrupts his or her training role with interns, assistants and postgraduate students. The orientation of the training is also different. Ibarra (2000) argues that new researchers should not be trained for academic practice but for research in different sectors of the economy. Their training should emphasize the cognitive and technical skills required for

posing and solving problems. Cabero (2001) states that the training of a researcher should develop certain abilities, skills, beliefs, values and attitudes that make up the personality of the student or of those who carry out these activities.

Training for research

To properly address the topic of training researchers in the development of skills, it is necessary to describe the concept of training researchers, based on the views of different authors, which are detailed below. Martínez (1999) argues that the training of a researcher cannot be reduced to a training in the scientific method or to a position that highlights the unique character of each object of study.

How should researchers be trained?

Research training consists of trainees' participation in an environment that encourages and requires constant research activity. Díaz-Barriga and Rigo (2000) argue that the researcher forms, establishes and maintains a permanent interaction with the object of his or her knowledge, explores and identifies the topic, develops the problem and defines the object of research, as soon as he or she assimilates and reconstructs the disciplinary meanings related to his or her area of expertise. During this journey, the research problem is transformed, as it is located as a fragment that is part of a larger problem, and for whose solution the efforts of an entire work team are combined.

Tamayo (2011) articulates the parts of a whole in which the product of research work acquires importance. The research process resizes the problem to the extent that it evaluates the scope of the research in which it is located.

Maggio (2012, p. 6) considers that "research training" can be used as a synonym for "teaching research", but prefers to use the term "training" because it implies not only the appropriation of knowledge, as in teaching, but also promotion of research competences, which is part of professionalization. It also has a mediating function that stimulates the transformation of the person in terms of their potential and capacities. Research training requires a different emphasis and must be supported by various procedures, oriented to the fundamental objective of the training. Training researchers is different from training for better performance in professional practice, or training teachers who will incorporate research as an aspect of their daily work.

The General Directorate of Higher Technological Education (2012) (Dirección General de Educación Superior Tecnológica) in their educational model for the twenty first century, mentions the necessary conditions for training researchers:

- The integration of a deep and objective knowledge of the contemporary problems in the professional field, regionally, nationally and internationally.
- The promotion of different modes of intelligence, as well as competences that align with world-class standards.
- Research as a way of creating knowledge that, due to its importance and timeliness, enriches the human heritage, and strengthens ties with its regional, national and international environment, with the ultimate purpose of improving living conditions.

- The development of capacities and abilities to acquire, analyze, interpret and handle information, generate knowledge, and identify, pose and solve problems, as well as make decisions.
- Improvement of the capacities and abilities for collegial work, in teams, in changing situations and in multicultural environments.
- The establishment of high-level human resources who are constantly updated and competent in oral and written communication, in at least two languages.

This list provides the identity of trainers in research, with a vision that aims to have a favorable impact on the whole person, for trainers and trainees alike, in every fibre of their being.

Definition of competence

Tobón (2001, p. 7) conceptualizes competences as an "ideal performance that emerges in a specific task, in a context with meaning. It is knowledge that is properly assimilated, so that it can be applied in a given situation, with such flexibility as to provide varied and relevant solutions". Tobón and Fernández (2004, p. 4) state: "As an organizing principle of training, competence can be seen in the set of attitudes, knowledge and specific skills that make a person capable of carrying out a job or solving a particular problem".

Components of competences

- Interpretation of information: Consists of understanding information, seeking to determine its complex self-referential meaning, to elaborate and re-work with a view to developing meta-understanding.
- Argumentation: Involves the creation of logical, symbolic and abstract systems of theories and concepts.
- Proposition: Consists of the generation of new conditions, beyond meaningful representation, with a foundation of a previous criterion.

Levels of complexity of competences

In the development of competencies, it is important to have criteria to assess the extent of their development. It is helpful to recognize different levels of complexity. Below is a proposed classification of competences designed by Tobón (2001), which indicates the significance and order levels of complexity:

- Level of routinization: The action arises from a routine, with self-correction, anticipation and flexibility. It is not the mere mechanical repetition of rules, but know-how.
- Significance level: The performance of tasks or problem solving is based on the construction of meaning, linking representational knowledge with procedural knowledge, through psychosocial and historical-cultural processes.
- Update level: The processes extend to other domains that were not initially in the scope of the competence.

- Level of experience: Understanding, assessing and approaching problems and particular contexts based on experience of many cases and assumptions, without the need to rely exclusively on pre-established rules.

Characteristics of the researcher in competence development

In order to describe the characteristics of the researcher that guide the development of competences, the views of various experts who conduct research are considered, in relation to the features that define the research process, including skills, conditions and competences. Developing research competences implies that these are integrated in the professional training process, consolidating abilities of observation, interrogation, recording field notes, experimentation, interpretation of information and writing about professional practice. It involves the ordering and systematization of the actions of researchers. Santos (2010) identifies the ability to write well as a key competence in the success of a researcher.

Litwin (2012) argues that there are competences that contribute to the growth of knowledge and the teaching of the research process, including:

- Competences related to professional and social behaviour, covering the decision-making and accountability essential to any investigation.
- Attitudes, especially work motivation, commitment to change, and consideration of the environment.
- Creative and ethical competences, and the ability to seek novel solutions at the same time as managing risk in an ethical way.

Santos (2010) considers that research on competences stimulates:

- Conceptualization and categorization of the context by developing theories or models.
- Identification of the principles and norms that govern research activity.
- Reporting, to the academic community and society, the concepts, ideas, reasons, descriptions and interpretations from different theories and disciplines that contribute to the research.
- Permanent construction of the organization of research, and the main modes of communication and interpretation between research groups and the wider academic community, thus promoting the visibility of research.

According to Tobón and Fernández (2004), researchers need to acquire practical skills, to understand what research should be, and to know how to know and know how to do. This would allow researchers to deepen their knowledge of a variety of situations as true researchers, whose competences lead to successful knowledge of society.

Moreno (2003) concludes that the skills can be classified in a "Profile of investigative skills" as follows:

- Skills of perception: sensitivity to phenomena, intuition, breadth of perception and selective perception.
- Instrumental skills: mastery of language: reading, writing, listening, speaking; mastery of basic cognitive operations: inference (induction, deduction, abduction), analysis, synthesis, interpretation; knowledge of how to observe and how to question.

- Thinking skills: ability to think critically, logically, reflectively, autonomously, and flexibly.
- Skills of conceptual construction: ability to absorb and reconstruct the ideas of others, generate ideas, order logically, expose and defend ideas, problematize, unravel and develop (build) an object of study and creatively synthesize concepts.
- Methodological skills: build the research method, use appropriate methods of knowledge construction, design research procedures and instruments, retrieve and / or generate information and handle and / or design techniques for the organization, and analysis of information.
- Teamwork skills: work in groups, collaborate in the construction of knowledge, communicate and disseminate knowledge.
- Meta-cognitive skills: relate to the object of knowledge, self-regulate the cognitive processes of knowledge production, question the actions intended to generate knowledge, evaluate approaches to the study and assess the consistency and validity of the products of research.

These skills enable the researcher to develop an understanding of the training of researchers in the development of educational competences, on the basis of their reflections and practice as research trainers.

Conclusions

The focus of research training on the development of competences is linked to methods of teaching research practice. Research training should be integrated in curricula at all levels of education. Early training should be incorporated into basic and secondary education, research should be a working tool in undergraduate study, and it should be a priority in postgraduate study, in order to develop research skills.

Litwin (2013) concludes that a new model of teaching and learning, which he calls “research incubators”, is required, especially for young students. These are conceived as a space to exercise freedom and academic criticism, creativity and innovation. An incubator not only generates knowledge for the improvement of systems, but also transfers and trains its members for the development of thought.

Research incubators allow students to participate of in the management of research projects of different kinds, and participate in the diagnosis of their social and environmental situation, strengthening their capacities for decision-making (Litwin, 2013).

Theoretical courses, methodological seminars and technical workshops are part of a comprehensive strategy for the acquisition of theoretical, methodological and technical skills and abilities. These must be articulated with each other, starting from the object of study, with research training as the central axis. Integration into college programmes should be considered, leaving individual and decontextualized work behind. The participation of researchers in the process responds to the needs of current settings. Researchers need different skills, and must be able to understanding and manage their skills, as well as assimilating and generating new knowledge.

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Mashraky Mustary

Collaborative Governance and Civil Society: A Comparison between Japan and Bangladesh Educational Policies

Abstract

This study is aimed at addressing the concept of collaborative governance and civil society on matters pertaining to educational policies, from a comparative perspective between Japan and Bangladesh. The research addresses collaborative governance efforts that are in place to enhance education in both Bangladesh and Japan, which include the private sector, government, and the community coming together to contribute to the formulation and implementation of educational policies. Similarly, the study addresses the role of civil society in both Bangladesh and Japan in terms of contributing to the formulating and implementation process of educational policies. A thorough literature review, which constitutes theoretical and empirical work, provides an excellent source of additional information for answering the research questions. An analysis and discussion of the results is pivotal to providing insights into the differences between Japan and Bangladesh in terms of the collaborative governance and civil society on matters regarding educational policies. The recommendations, which include ideas to be adopted by both nations and those to be adopted by future researchers, accompanied by the conclusion, complete the research.

Keywords: collaborative governance, civil society, Japan, Bangladesh, educational policies, comparative analysis

Introduction

Collaborative governance and civil society are essential aspects in the education sector because of the role, they play in ensuring that the formulation and implementation of policies is successful. Collaborative governance refers to the coordination between government, private sector and community, in working together to ensure that they achieve a common goal, that would have otherwise been difficult for individual sectors working alone to attain. In other words, it constitutes:

> *… a governing arrangement where one or more public agencies directly engage non-state stakeholders in a collective decision-making process that is formal, consensus-oriented, and deliberative and that aims to make or implement public policy or manage public programs or assets* (Ansell & Gash, 2008, p. 544).

Civil society refers to the range of organizations such as those that are non-governmental, charitable companies, and labor unions, which influence the actions that policy-makers engage in, to ensure that the best courses of action are taken for the betterment of the country.

It is widely acknowledged that the concepts of collaborative governance and civil society can combine efforts to influence the education sector of a nation significantly. Bangladesh and Japan are some of the nations that benefit from the collective effort from civil society and collaborative governance because these aspects fast track the formulation and implementation of policies, as well as

ensuring that the policies are worth formulation and action, in that they help the citizens. The primary difference that makes the education sectors of many countries distinct, other than the resources available, is the level of engagement of civil society and collaborative governance. Therefore, conducting a comparative analysis of the collaborative governance and civil society participation from a perspective of educational policies is essential in uncovering and understanding the differences that exist between the two countries.

About the research

Research objectives

The research objectives for this study aim at creating an understanding of the difference that exists in the education sectors between Japan and Bangladesh, by examining the participation of collaborative governance and civil society in both nations. Furthermore, the study seeks to establish, which nation between Bangladesh and Japan is advanced on matters regarding education, so that one country can be a benchmark for the other.

Rationale of the research

The rationale for this research was motivated by the need to find out the role of collaborative governance and civil society in educational policy formulation and implementation, as well as the need to compare Bangladesh's education sector to that of a more developed country namely, Japan.

Research questions

This research seeks to address several questions as outlined below:

1. What is the role of collaborative governance and civil society in educational policy formulation and implementation in Japan?
2. What is the role of collaborative governance and civil society in educational policy formulation and implementation in Bangladesh?
3. How do Japan and Bangladesh compare in terms of their educational policies' preparation, bearing in mind the concepts of collaborative governance and civil society participation?
4. What are the recommendations for Bangladesh for it to ensure that it raises its education standards through policy change and utilization of collaborative governance and civil society in that process?

Research background

A wide range of information exists, which discusses the issues revolving around collaborative governance and civil society in the context of educational polices in Japan. Education in Japan is relatively enhanced because of the role that collaboration between the government, private sector and civil society groups plays.

Similarly, Bangladesh demonstrates a comparable case to Japan, with the only difference appearing in the performances that students in schools exhibit. Research has been done in the past to examine the education system in Bangladesh, how policies are formulated and how they affect education and the role that collaborative governance processes and civil society participation, contributes to bettering

education in the country (Tasnim, 2017). With the presence of such kind of information, it becomes easier to analyze the situation and assess the impact that collaborative governance and civil societies have on policy formulation processes, in the Bangladesh education sector.

Literature review

Japanese collaborative governance and civil societies from a perspective of the educational policies

Collaborative governance in Japan has played an essential role in ensuring that educational policies are formulated and implemented in the best way possible. According to Pekkanen et al. (2014), Japan utilizes collaboration opportunities more than does Bangladesh, because of a belief that this has a positive effect on the processes involved in ensuring policies are formulated and implemented. Collaborative governance constitutes the coming together of different sectors that have an interest in education where technical, managerial, political, and financial capacities are utilized optimally. According to Mustary (2021), the collaboration will also concentrate on developing a stronger and better curriculum that will allow teachers and students to display their best results in teaching and learning respectively. Japan's educational policies indicate that education is mandatory for every school- aged child. This has been implemented over several years, which have seen most of the students perform well, partly because of the presence of sufficient resources.

According to Young (2000), the essence of the local and national government of Japan working together, is that local governments vary in terms of the context of the community they represent. Hence, educational policies in one local government could slightly differ with others from a different local government. This disparity can only be detected when the national and local governments together with other stakeholders enforce educational policies. Similarly, during the policy formulation processes, local governments that have teamed up with the national government can raise any problems and air their grievances that are related to the individual contexts of their educational needs. This enables them to negotiate on what should be included in the policies, to suit the conditions in their respective regions. Young (2000) asserts that collaborative governance in Japan has significantly yielded excellent results in terms of assisting in the formulation and implementation of educational policies.

In Japan, the concept of collaborative governance arises from the idea that the municipalities need to collaborate with governmental agencies to ensure that the process goes through smoothly. Such kind of governance is visible when the municipalities lack the necessary funds to hire teachers, for example, and resort to looking for financial help from the local or national government (Takayama & Lingard, 2019). Therefore, collaborative governance in Japan's education sector seems to be working well, especially when it comes to implementing the policies.

The institutions of higher education in Japan are constituted in such a way that the policy governing them requires that decision-making be a shared responsibility, between the institution and the government. The concept of collaborative governance manifests itself at that point, because the government is cooperating

with an institution of higher learning to make decisions (Ahn & Ha, 2014). The Japanese government through the Ministry of Education, Sports, Science, and Technology (MEXT), regulates the standards that Japanese universities need to adhere to during their establishment and cooperates with the institutions involved. Collaborative governance makes work easier in the Japanese education sector by ensuring that the right decisions are made and the implementation of policies is done effectively, which is commonly evident in the collaboration between finance and education sectors (Huang, 2018).

In Japan, there is significant evidence from the involvement of the local government in conjunction with the schools, of collaborative governance. The two bodies, the schools and local governments, come together through an educational board, to evaluate education systems and ensure that everything is operating as smoothly as possible (Yonezawa, 2011). Collaborative governance, therefore, constitutes different sectors coming together to ensure that the policies of education in Japan are formulated and implemented correctly. According to Mustary (2018), the Japanese educational system holds the view that the system is to be used to the advantage of all students, despite their age, color and gender. Therefore, it provides equal learning opportunities to all children willing to learn. The system envisions continuing to be the best in the world by constantly improving the curriculum to fit global changes. On the other hand, civil societies in Japan equally play a critical role in ensuring that educational policies are formulated and implemented successfully and in the right manner. The Japanese education system is more focused on moral education, such that as students develop into professionals, they still maintain proper behavior in their course of duty. This is important in formulating and implementing educational policies because NGOs provide financial support to the relevant programs that promote morality. Japanese educational policies are keen on discipline and the development of moral values.

During the process of policy formulation, many requirements arise for the formulation process to be completed. As such, civil societies in Japan often play the role of seeking to raise awareness of the need to fund education. Japan is more developed than many countries in the world and as such, the people understand the significance of education (Marginson, 2011). In Japan civil societies play a crucial role in acting as advocacies for education and students as well. The more, civil societies engage in education the more they gain experience regarding the components of an educational policy and therefore it becomes easier for them to contribute to policy formulation. Considering the huge number of civil societies present in Japan, it is impressive that their voice and contribution in the education sector is always recognized, through being allowed to participate in policy formulation and implementation processes so that their ideas can be captured in the final policy formulation activities.

Since most of the civil societies in Japan have direct contact with schools and, therefore, understand the challenges and needs the institutions require fulfilled, the civil societies are critical in presenting such issues in policy formulation dialogues (Rohlen, 1983). This has made Japan's education system strengthen over the years and the results have been visible through the excellent performances displayed by students at all school levels.

Bangladeshi collaborative governance and civil societies from a perspective of the educational policies

The education system in Bangladesh is not as advanced as that in Japan. It is to be expected that the policies in Bangladesh do not have much influence on education compared to those formulated in Japan, because the latter country is more developed. According to Thornton (2006), collaborative governance plays a vital role in ensuring some strides are made in the education sector through the formulation and implementation of educational policies. Collaborative governance in Bangladesh is evident in most of the high schools because of the introduction of formal programs that are undertaken in classrooms (Thornton, 2006). The education standards and level in Bangladesh is quite low compared to that of Japan. A significant number of the population are illiterate and that is why the Bangladeshi government is working hard to ensure collaborative governance takes effect across the country.

However, the concept of collaborative governance is not as effective in Bangladesh as it is in Japan for various reasons. The difficulty of the Bangladeshi curriculum contributes to the difficulty in promoting the culture of different sectors collaborating, in terms of offering governance in the education sector. Despite the idea that education in Bangladesh is satisfactory and consumable, the difficulty in the formulation of the curriculum is that there is insufficient collaboration between different sectors including the government.

Based on the available policy frameworks, the government and non-governmental organizations in Bangladesh often combine efforts to ensure that the implementation of educational policies occurs smoothly. For example, in Bangladesh, early childhood education in most schools is offered on the basis of a collaboration between NGOs and the national government. This is an educational policy that aims at building a strong foundation for education for the young children. This is an example of how collaborative governance in Bangladesh works well. Analysis of the level of educational collaborations in Bangladesh demonstrates that it can hardly be compared to that in Japan. Collaborations in Bangladesh yield results on a small scale only, because the government is not fully investing in the education sector as it is in other sectors. At present, the investment is similar to that of previous years, where education was given less attention (Panday, 2018).

Policy formulation and implementation processes in Bangladesh also rely on the collaborative governance, because the government through its agencies holds consultative meetings with various stakeholders in the education sector, to establish the needs that people and schools have in terms of what is required to ensure that education continues and improves. In Bangladesh, the implementation of educational policies is not as effective as is the case in Japan because individuals are only gradually beginning to embrace the importance of attending school.

On the other hand, civil societies exist in Bangladesh, which play a role in contributing to the formulation and implementation of educational policies. The Campaign for Popular Education (CAMPE) is a coalition in Bangladesh, which began as a network of non-governmental organizations that seek to contribute in the education sector in different ways. Today, CAMPE has over 1000 NGOs that support education matters in Bangladesh (Hossain et al., 2017). The role of CAMPE in helping in the formulation of educational policies is that it reaches out to its

members for ideas that can be helpful in bettering educational policy proposals. This is a critical move for the civil society in Bangladesh because it indicates that the NGOs mind about educational policies, since they have an impact in the corporate world in which the NGOs operate.

CAMPE occasionally conducts surveys aimed at finding out about the progress of the Bangladesh education sector. This process of monitoring is important because it ensures that CAMPE can contribute at an appropriate time, in the processes involved in formulating educational policies. The coalition fulfills its monitoring mandate using a mechanism known as education watch (Hossain et al., 2017). This mechanism helps civil society in Bangladesh to stay alert and ready to act whenever there are any educational policy issues that are being discussed. Through the monitoring process, CAMPE can submit the recommendations from its members regarding the policies of the country's education sector. Consequently, policy formulation and implementation processes become part of CAMPE's, work, which means that civil society in Bangladesh is actively involved in educational policies.

The campaigns for the increase in resources, especially for the public schools in Bangladesh, has been one of the primary efforts that CAMPE has been displaying over recent years.

Research design and methodology

The research design adopted in this research was the mixed method approach. This approach was ideal for this study because it constitutes the use of data from different sources, which results in the generation of credible information (Dunning, 2008). The descriptive methodology was ideal for use in this study because of its ability to accommodate quantitative and qualitative data. Quantitative data is addressed in the results section of this study, whereas qualitative data is addressed in the empirical data section.

Empirical data

This study constitutes empirical data that was obtained from online interviews and surveys. The surveys constituted 12 participants in total (6 apiece from Japan and Bangladesh), whereas the interviews constituted 20 participants (10 apiece from Japan and Bangladesh). The participants for the interviews constituted 5 men and 5 women from Japan and a similar set of participants from Bangladesh. Similarly, those who participated in the surveys constituted 3 men and 3 women for both Japan and Bangladesh. All participants were over 18 years and all signed an online consent form. Their contacts were obtained via Facebook pages in, group forums of their respective nations.

Results and discussion

The study uncovered the idea that in Japan, collaborative governance is more effective than is the case in Bangladesh. Out of 10 interviewees who attended the interview issued, 8 of the participants from Japan (80%) argued that collaborative governance is extremely effective in bringing different sectors together to contribute in the educational policy formulation and implementation. Six out of the 6

participants (100%) who took part in the online survey indicated that Japan utilizes civil society to influence policy formulation and implementation. Four out of 10 participants (40%) from Bangladesh of an online interview indicated that collaborative governance is an idea that is still picking up pace, but is showing signs that it can help in educational policy formulation and implementation. All the 6 participants (100%) from Bangladesh, of an online survey said that civil society through CAMPE is extremely effective in articulating the educational policy issues that affect Bangladeshi schools.

Japan utilizes collaborative governance more than Bangladesh does. This explains to some extent why Japan experiences more success in education. Collaborative governance is important because it brings together many different sectors, which then pull resources and expertise together to handle the issues in the education sector. The civil society in Japan is sufficiently cooperative and that explains why more NGOs are willing to invest in education policymaking and implementation processes. On the other hand, Bangladesh has invested more in civil society through CAMPE, which has yielded fruits in terms of finding representatives who can speak on issues at the policy formulation table, on behalf of many people in the education sector.

Conclusion

Therefore, this study concentrated on the establishment of the role that collaborative governance and civil society play in the formulation and implementation of educational policies in Japan and Bangladesh. Therefore, collaborative governance and civil society play a crucial role in the context of educational policies in Japan and Bangladesh. There is still a need to research more in the future, because of some uncertainties such as of how collaborative governance will work out in the future of Bangladesh. It is to be recommended that Bangladesh utilizes collaborative governance more in educational policy formulation and implementation. This will help the country's education sector improve significantly. Bangladesh government officials and all stakeholders in the education sector should widen their thinking to produce better policies that will guarantee faster growth of the education sector. Japan should continue utilizing collaborative governance to maintain the high standard and level of education that it offers to its students.

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Raya Mihaylova

Technology as an Actor in Communication between Teachers and Parents: the Case of Electronic Diaries

Abstract

The paper focuses on the influence of technology on communication between teachers and parents through electronic diaries. Theoretically, the paper is based on action-network theory and its understanding that non-human and human actors build a network of relationships. By using a qualitative research approach, including interviews with principals, teachers, and creators of the e-diaries, as well as focus groups with parents and students in several Bulgarian schools, opinions of the different stakeholders are explored in depth. The results show that communication is lacking or is really rare through electronic diaries or it can be one-sided, without the parents' possibility to reply to teachers. It is argued that the level of participation of parents in the educational process is low. Most parents and teachers do not really see the need to be more involved or to communicate through the diaries. If educational reforms and especially measures to increase parents' level of involvement are to be undertaken, they should take into consideration parents' understanding of the educational process and their views on how they could be more actively involved and how they could contribute to the overall change in the educational system and a more effective teaching and learning process.

Keywords: education, electronic dairies, parents, teachers, communication, schools

Introduction and justification of the topic

The influence of ICT on education is a key topic, as is evident from the large body of research on it during the last 40 years. Due to the rapid development of technologies, this field is changing constantly (Voogt & Knezek, 2008). It is of key importance to understand the role of digital technologies in education and how they are integrated and used in an effective way. Also, it should be analysed how ICT can serve to overcome (instead of reproducing) social inequalities and to prevent their transformation into educational inequalities. This field has still not been researched systematically (Lonka, 2015). The topic has also become especially relevant in view of the worldwide pandemic of COVID-19 and the need for adaptation of education to the new situation and for usage of alternative electronic forms from a distance. More concretely, the paper focuses on the influence of electronic diaries on communication between teachers and parents.

Through electronic diaries, students, teachers, parents, principals, and other social actors in the educational process can make use of shared information and see grades, remarks, absences, and weekly programme. The use of a telecommunication application (similar to Zoom, MS Teams, etc.) allows to understand better the teaching and learning process, as well as seemingly, to establish communication between parents, teachers, students, principals, etc. on the information in the electronic diaries and all other matters concerning students.

Theoretical considerations: technology at school and communication between teachers and parents

Digital technologies are inextricably linked with everyday lives of students, so the issue on their possible applications in formal education is of key importance. Initially, computer technologies were used for processing information, but when a communication function was added, this increased their potential for application in education. Communication gives the possibility of constructing logical arguments, based on different sources and supposes a sensitivity towards the audience. Communication is established in many ways through internet and technologies – emails, voice messages, chat platforms, etc. (Mattila & Silander, 2015). In the educational process, students can communicate mainly with each other and with their teachers, as well as with anyone else, with whom it is necessary.

Electronic diaries and their role in education could be understood through the actor-network theory of Bruno Latour. Actor-network theory (ANT) first appeared in the field of science and technologies, through the work of Latour, as well as John Law and Michel Callon, while currently many other authors use it in their work (Rowan & Bigum, 2003). The theory is interesting with its idea that human and non-human elements are intertwined into objects. The theory follows the specific links and translations, which connect all these objects, processes, concepts, and institutions, as well as the movements of these objects that assemble and arrange the everyday practices in certain ways. Most studies, that apply ANT, perceive all things as actions, which result from continuously produced networks of relationships.

According to ANT, there are no 'social explanations' for every phenomenon (similarly to laws in natural sciences). The focus on relationships, which makes up the network, not the network in its entirety, allows for a different type of understanding of the process of creating this network and the variability of its connecting elements. The actors in the network change the initially set goals; the active forces, taking part in interactions, can also change (Latour & Akrich, 1992; Latour, 2007). 'The word 'actor' means that the social role is important, and it is never clear who or what acts, since the actor is never alone' (Latour, 2007, p. 32). The actors can be non-humans as well (objects, technologies, anything outside of human social actors), to whom is attributed active force. Having in mind that actors are never alone, non-humans for sure do not have the ability to act alone, they are always in a network with other actors, among which are humans as well.

The approach of the 'sociology of associations' is applicable in research within sociology of education and, more specifically, when it comes to other social actors, included in some way in the educational process (Tummons, 2014). This author has conducted an ethnographic research on a training programme for teachers in a network of colleges in England. By using ANT and relying on the principle of symmetry between humans and non-humans, it is demonstrated how the educational process can be viewed when we take into account both human and non-human actors who are in the network. Every artificial distinction between them would be fake, since what is achieved in the network is a result of joint activity of inseparable actors, humans, and non-humans alike (ibid, p. 162). The understanding that students, viewed as actors, are a part of a network, including their relationships with other students and teachers, as well as with technological and non-technological components in a certain classroom and school, is key. Electronic diaries are a

technological component or a non-human actor in this network of relationships, and they can change communication since they are mediators. This means that they add something from themselves in the process of interaction with human actors; they are not just passive intermediaries in the educational process, but rather they act as a tool, which, when well used and organized, aids communication between all participants.

Electronic diaries in Bulgarian schools

Electronic diaries have been used in the Bulgarian educational system since 2017, with 'Shkolo' as the most used platform, although there are more possibilities on the Bulgarian market. The idea for an electronic diary, which would replace the paper version and facilitate the process of compiling school documentation, was born in 2010. Two friends created a version of an electronic diary as students in the 12th grade and, consequently, together with two more friends in 2016, they created the start-up and software platform 'Shkolo'.

Initially, in 2016 the regulatory framework of the country for the usage of electronic dairies was set, in an ordinance of the Ministry of Education and Science. According to the ordinance a school can start using an electronic dairy exclusively if the details in its electronic sections are compatible with the National Electronic Information System for Preschool and School Education. The Ministry of Education and Science has ensured the creation and introduction of electronic sections from the module 'Documents on the activity of the institution', necessary for keeping diaries in electronic form since the school year 2018/2019 and 67 schools started using the platform in that year. The budget for this activity was 2 million BGN (about 1024028 euro). All the schools that applied through the platform of the Ministry in order to use an electronic dairy in the consecutive 2019/2020 school year, received funding, differentiated according to the number of students studying in them.

Right before the transition to distance learning (in an electronic environment or other form) the schools were supported in different degrees with the proper virtual environment and 73% of schools had an electronic diary (Institute for Research in Education, 2020). In 2020/2021, 96% of schools had an electronic diary (Institute for Research in Education, 2021). At the moment, 1700 schools use Shkolo's electronic diary (Institute for Research in Education, 2020). There are around 8 types of electronic diaries in the country. Apart from Shkolo, other diaries are of 'Admin plus', 'Siela', 'E-diary', 'Phoenix', etc.

With the e-diary that the team of Shkolo has developed, Bulgaria has become one of the four countries in the EU which uses electronic diaries and one of the few countries worldwide, together with the UK, Estonia, and the US, which uses software systems for school management (Ivanova, 2021).

Methodology of the empirical study

The empirical study focuses on the influence of electronic diaries on the communication between teachers and parents. The research approach and methodology are based on qualitative methods for data collection. The reason for choosing these methods is to be able to understand in depth the opinions of the different stakeholders.

Two schools took part in the research, including principals, teachers, students from 9th, 10th and 11th grade and parents of students. These grades were chosen so that students would have enough experience in the school system and with electronic diaries, which were introduced gradually at schools in Bulgaria a couple of years ago. The two schools were selected according to the following criteria: average grades from the state matriculation exam after the 12th grade for the school year 2019/2020; location of the school; type of school; usage of an electronic diary; socio-economic profile of the students in the school. Seven in-depth individual and dual interviews were conducted as follows: 2 with principals, 5 with teachers and one with a representative of a company, which has created the electronic diary. Four focus groups were conducted with students and parents as follows: one with students in the first school, two with students in the second school, as well as one with parents in the second school. Six parents from the first school filled out questionnaires with open questions.

Some of the interviews and focus groups were conducted face-to-face and others online, depending on the COVID-19 pandemic situation. The interviews and focus groups were audio-taped and transcribed. The methodology for data analysis includes coding and analysing interviews (Glaser & Strauss, 1967). The present paper refers only to some preliminary results.

Some of the limitations of the study in this paper that should be noted are related to the COVID-19 pandemic. The restrictions due to the new virus partially obstructed the fieldwork or made it necessary to conduct interviews and focus groups online, which had an influence on the study results. Also, results are not generalisable to the whole country or any other context outside of the scope of the study and the two chosen schools.

Communication between teachers and parents: the case of electronic diaries

The key research question in the paper, as pointed out above, is whether and how communication is established between parents and teachers through the usage of electronic diaries, having in mind that they have such a communication function and that one of the goals of their introduction is to make parents more engaged with the educational process. Data from interviews and focus groups show that communication through the diaries is often lacking, or it is one-sided and most of the interviewees take this as something normal. However, there are different points of view and aspects of this.

Principals and teachers sometimes publish messages for all parents and students, but they turn off the possibility to receive replies from them, which makes communication one-sided. They explain this through examples in which they publish an announcement for a certain event and every parent replies ‘Thank you’ on the platform, which creates unnecessary spam. In other cases, replies are not serious. One principal shares:

> *I limit the possibility for communication, when I decide, for parents and students alike, because they are not serious, and no communication is achieved.*

Some teachers explain that they publish messages, but they don’t really know if parents read them, so it is apparent that communication is not achieved:

In general, there is a possibility for communication, to publish messages, also everybody has an opportunity to mark when class tests are, other kinds of tests, things like this, to make announcements on the schedule or on events. We have put messages, especially when we studied from a distance. I don't know and can't say if parents read them and use them, of course… The method of communication here is one-sided as in other schools, so we publish messages and that's it, there is no possibility for them to answer and write.

Teachers also point out that parents are more engaged now than before and, seemingly, communication with them is more effective. However, they call communication simply the access to information they have placed regarding grades, absences, remarks, etc. instead of the actual communicating process where they exchange messages. Other teachers define communication as two-sided since it actually reaches their audience, although they cannot reply:

Shkolo is the main way of fast communication, it can be one-sided or two-sided… Shkolo is two-sided communication, especially the application for the phone alerts parents. So, we are using mostly this, the most convenient way for our students.

Representatives of one of the widely used platforms for electronic diaries believe that it is not necessary for communication to take place in the platform:

You don't usually comment on grades, absences, and remarks, this is the system, you don't have anything to write on the platform. There are no limitations, but there are formal things, which are normative, there is nothing to add. Students can do only what they need to do in the electronic diary.

It seems that there is a rather hierarchical, normative way of understanding the usage of the platform, which probably explains why there are several different types of profiles (for the students, parents, teachers, principals, and admin), each of them restricted in what could be seen and done. For instance, students and parents can mostly read information, while teachers can publish and change it. This reflects on the possibility for communication between the different social actors.

Most teachers share that communication is established, but mostly through Viber or phone calls, while the electronic platform is used mainly for access to information. Parents also say that they rarely communicate with teachers through the platform, they rather use other ways of communication or don't communicate at all.

It is notable that most of the parents who took part in the study, as well as most of the teachers answer that they do not communicate with each other through the electronic diary. Students also say that they use the platform for accessing and knowing their grades, absences, and remarks at all times, but other than that, the platform cannot increase their level of participation. They believe it is normal for them not to be able to communicate through the diary, which is also a shared opinion between teachers and parents.

Discussion and conclusion

The electronic diaries used in secondary schools across the country are one of the important but under-researched 'non-human' social actors in education. Communication between teachers and parents should, supposedly, be one of the functions of the platforms and one of the goals of the electronic diaries is to increase the level of engagement of parents in the educational process. However, in the two studied Bulgarian schools such communication is lacking and teachers and parents,

principals and the creators of the electronic diary take this as something normal. This finding suggests that in these schools the network between the electronic diaries as a non-human actor and the human actors is very loose. The revealed lack of communication could be regarded as indicative of some problems in the entire educational system and for the overall lack of a systematic communication with parents through other mediums as well. Parents are not an integral part of the educational process, and they are not really involved, apart from receiving information, which is also true for students. This means that the level of participation of parents in the educational process is low. It is important that this refers to two different types of schools (one of them is professional, the other is a language school) in different locations, so it could vary from school to school in general, but it could also be more of a systematic problem, related to the attitudes of different social actors across the educational system as a whole. It is also important, that most parents and teachers do not really see the need to be more actively involved or to communicate through the diaries. However, if educational reforms and especially measures to increase parents' level of participation are to be undertaken, they should take into consideration parents' understanding of the educational process and their views on how they could be more involved and how they could contribute to an overall change in the educational system and a more effective teaching and learning process.

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Part 4
Higher Education & Teacher Education and Training

Su Xu

Beginning Teachers Training System in Shanghai: How to Guarantee the Teaching Profession from the Start?

Abstract

In the last decade, the Shanghai Municipal Education Commission has piloted beginning teachers training system to guarantee the teaching profession from the start. This paper explores concepts and features of beginning teachers training (BTT) system, and challenges and strategies related to the design and implementation of beginning teachers training policies in Shanghai. A qualitative study to explore the challenges and strategies of beginning teachers training system is conducted. In the summary discussion, suggestions are made for policy makers and teacher educators when they try to improve design and implementation of BTT system.

Keywords: beginning teachers training, challenge, strategy, Shanghai

Introduction

Initial teacher preparation is the first step in the continuum of teacher professional development, and should be seen as a complex system that evolves according to the interactions of the various stakeholders (e.g. policy makers, teacher educators, teachers, candidates) and material artefacts involved (e.g. accreditation criteria, professional standards) (OECD, 2019). Since the 1990s, the Shanghai Municipal Education Commission (SMEC) has begun to study and implement teachers training for primary and secondary school teachers. Since 2009, SMEC has piloted beginning teachers training (BTT) system, which provides initial teachers who graduate from normal universities or other institutions with one-year probationary training, and supports them to be qualified teachers as soon as possible (SMEC, 2014). During the probationary period, beginning teachers are equipped with professional training with unified content and standards in teachers' professional development schools (TPDS) accredited by the SMEC and local districts.

This paper explores concepts and features of BTT system that are key for policy design, and challenges and strategies related to the design and implementation of BTT policies in Shanghai. In the following sections, a review of the implementation

of initial teachers training with the concepts and features of BTT system is first given. Then the findings from a quality research into the implementation of BTT system in Shanghai are presented, in which both challenges and strategies to BTT are examined. The last section draws summary discussion with regards to the effective governance of BTT and offers future directions for policy and research.

The background and framework of BTT in Shanghai

In the process of urbanization in China, Shanghai was faced with the contradictions of the transformation of urban functions, the transfer of urban population, the inflow of migrant workers, and the lack of public service facilities. On the one hand, a large number of people in the central urban area have moved out, the source of students has shrunk, teachers have retired, and new teachers need to recruit; on the other hand, a large number of new residential areas in the suburban fringe have been newly built, and a large number of people have been imported. Many new schools have been opened, and a large number of new teachers have been recruited on an annual basis.

The career start of these new teachers is directly related to the overall level of Shanghai's teaching staff and the quality of education in the next 5-10 years. Considering the future needs of education in Shanghai, the Shanghai Municipal Education Commission decided to make use of the resources of outstanding schools and teachers to train new teachers in the current region, so that they can play a leading role in developing a new generation of teachers. This is the original intention of the Shanghai Municipal Education Commission that informed the launch of the beginning teachers training program.

At the same time, newly recruited teachers' practical experience is not enough to support school education and teaching practice, regardless of whether they graduated from normal universities or from non-normal universities. The practical experience courses arranged in the pre-service teacher education stage are not enough. For candidates studied in education colleges and normal universities, the educational internship is usually only about 8 weeks, and the total internship time does not exceed 12 weeks. For teachers graduated from other colleges and universities can obtain a teacher qualification certificate as long as they meet the academic qualifications and pass the written test and interview. For this kind of beginning teachers, they are not only lack of sufficient pre-service teacher education, but also lack of practical experience.

In addition, although all local districts and schools in Shanghai also had induction training for new teachers, there were certain limitations in the content, method, and management of the training. For example, the training content is separate and inconsistent; the traditional small workshop-style mentoring and apprentice pairing often stay at the level of personal experience, limited by "set and inertia", which is more arbitrary, and lack of scientificity and effectiveness. Due to the large differences in training resources and teaching strengths in different schools, and different degrees of emphasis on new teachers' induction training, the quality of induction training for first year teachers is uneven and varies greatly in different districts and schools.

In response to the above problems, the Shanghai Municipal Education Commission decided to implement a standardized beginning teachers training system. The fundamental goals of BTT system are:

1. Improve the humanistic quality and moral cultivation of beginning teachers, establish professional thinking style, enhance the professional perception, and clarify career aims and responsibilities.
2. Through practical experience, mentoring, interactive communication and self-reflection, etc., to understand the basic procedures and requirements of various teaching work, to form a good teaching code of conduct, to initially master the basic skills of teaching, and to improve teaching abilities.
3. Through guidance of mentors, teaching experience, thinking and reflection, etc., to understand the content of class management, to know the basic norms of the teaching work, to have a preliminary grasp of the methods and means of class management, to be able to carry out teaching independently, and to learn skills for communication with other teachers, parents and students.
4. Through professional reading, tutor mentoring, teaching practice, etc., to understand the key elements and basic procedures of various training activities, enhance research awareness, and learn to use research methods to solve problems.

In 2012, the Shanghai Municipal Education Commission enacted the main framework for beginning teachers training program on the basis of some successful experiences on teachers training, which includes 4 modules and 18 training points (SMEC, 2017).

Module 1: Professional perception and moral cultivation

1. Make a personal plan for participating in beginning teachers training, and write a personal training plan.
2. Read a book on teachers' professional career or teacher's moral cultivation, and write a reading report.
3. Complete no less than 10 essays about the teaching experience, including rules and regulations of the internship school, campus culture, lesson preparation methods, classroom teaching, teaching and research atmosphere, teacher-student relationship, student counseling, teacher etiquette, student groups, school features, etc.
4. Complete the training summary for beginning teachers, including their professional perception.

Module 2: Classroom experience and teaching practice

5. Under the guidance of mentors, study curriculum standards of the subject, and make a special speech on the interpretation of the curriculum standards in front of the teaching and research group.
6. On the basis of reading the textbooks, analyze the textbooks and design the teaching plans for the designated units, complete the analysis of the textbooks and the compilation of the lesson plans for a unit, and give teaching lectures in front of the teaching and research group.
7. Complete the conception and syllabus of an extended elective course, and teach an elective course based on their own interests and individual strengths.

8. In addition to the usual class observation, observe ten classes with purpose, and write a class observation report.
9. The mentors, the tutor team, and the relevant teacher educators will respectively check and observe formal trial teaching for three times.
10. Observe and comment on three lessons of other teachers with purpose, and write a lesson evaluation report.
11. Design a unit of student assignments and give out reasons in combination with teaching experience.
12. Design a unit test and make a quality analysis after the actual test; make corresponding remedial measures for students with problems. Complete a mid-term or final-exam class quality analysis under the guidance of the mentor, and propose teaching strategies.

Module 3: Class management and moral education experience

13. Hold a class cadre meeting, a student symposium on a certain topic, and make a home visit on a certain student's problem.
14. Under the guidance of the mentor, plan and preside over a class meeting with some theme or social activity.
15. Under the guidance of the mentor, propose one class situation analysis and two student case analysis; can make a comprehensive evaluation report for the student semester.

Module 4: Teaching research and professional development

16. Intensively read a professional book recommended by mentors, write down reading notes, and can self-study related books.
17. Actively participate in the activities of the teaching and research group, take the initiative to undertake relevant tasks, plan and preside over a lesson preparation activity under the guidance of mentors.
18. Formulate a three-year personal professional development plan under the guidance of mentors.

The above 4 modules and 18 training points are concrete tasks that the beginning teachers and tutors should complete together during the period of training. These tasks are transformed into forty training worksheets in *Beginning teachers training manual in Shanghai*, which is completed by beginning teachers during the training period.

The challenges and strategies of implementation of BTT system in Shanghai

Method

A qualitative research approach to explore the challenges and strategies for BTT is used, which collect, summarize and analyze the materials in the process of complementation. The materials include the dates from the pilot areas, the policy and implementation plan on the municipal and local district level, and reports on teachers professional develop schools, new teachers' professional stories, mentors' feeling, etc. In addition, three randomly selected beginning teachers who participated in the normalization training are collected for interviews. Based on the summary and analysis of these materials, the following topics are summarized.

How to ensure an evidence-informed beginning teachers training system

To promote the standardized beginning teachers training on such a large scale, designing BTT in an evidence-informed way is a huge challenge because it requires accommodating a range of very different timescales and organizational priorities. What strategies can address the challenge?

1. Establish a sound administrative and professional guidance system

In terms of administrative management, a two-level urban management system has been established. At the municipal level, the Shanghai Municipal Education Commission established the Shanghai Teacher Professional Development Project Leading Group and its office in 2011. The office is located in the Personnel Office of the Shanghai Municipal Education Commission to manage and coordinate and the standardized training of trainee teachers. At the district level, each district education bureau has established a managing group to plan and deploy local goals and strategies, accredit training schools and training bases, manage beginning teachers, and allocate funds etc.,

In terms of professional lead, Shanghai Teacher Training Center (STTC) is responsible for quality supervision at the municipal level. STTC regularly organizes expert groups to go to districts for supporting, supervising and evaluating, and holds meetings to summarize and promote success experiences timely.

At the district level, educational colleges have organized professional councils, which are specifically responsible for the regular management of beginning teacher training, including assisting the educational bureaus in reviewing the plan, selecting mentors, holding regular meetings, and so on.

2. Set up expert councils to strengthen professional lead

At the municipal level, the Shanghai Municipal Education Commission organized an expert council to go to the districts to supervise BTT, and collect dates in the process of BTT. In addition, experts are required to fill in the "Feedback Form" as expert feedback and provide reference for the districts to improve their BTT programs.

At the district level, local expert councils for BTT are specially set up, which supervise the process of BTT, interview mentor teachers, assess training plans, and offers suggestions.

3. Form a daily communicating mechanism

It is very important for BTT to have a good communication mechanism between the councils, districts, and PDTS level management agencies to improve managing effectiveness. For example, Huangpu District has established a good working communicating mechanism with the PDTS schools, which regularly keeps contacts with principals to obtain first-hand information, and feedbacks problem in a timely manner.

How to develop practical skills linked to theoretical knowledge

The transition from teacher education program to real school environments is the most important stage in the process of becoming professional teachers. Even a well-organized training program cannot compensate for the real problems and experiences in the first stages of new teachers coping with. The first year of the

teacher career is a critical stage to the acquisition of new critical professional knowledge and skills. It is essential to provide beginning teachers with effective strategies for managing pupil behavior. That is to say, there is a need to guarantee a minimum threshold of practical knowledge or experience to address the immediate challenges in classroom. BTT has taken strategies to address the dividing challenge in Shanghai.

1. Certification for teachers' professional development schools

Teachers' professional development schools (TPDS) provide a solid foundation for BTT system. In order to integrate the theory and practice in teacher education, the Shanghai Municipal Education Commission has launched the project of "Shanghai Teachers' Professional Development School and Teaching Internship Base" in 2008, which has certificated 28 teachers' professional development schools, and assigned them corresponding responsibilities and tasks, which is the first step in the reform of the teacher education system.

BTT lasted for one year, and at least 50% of the training is in teachers' professional development schools. Therefore, TPDS is the main training institution. In 2012, the Shanghai Municipal Education Commission (SMEC) officially issued the "Standards of Teachers' Professional Development Schools and Beginning Teachers' Training Bases". According to this standard, 116 TPDS are certificated by SMEC, and 264 TPDS by local educational bureaus. The certification and accreditation for TPDS has effectively guaranteed the integration of practice and theory in BTT. Then SMEC issued the document "Requirements for Teachers' Professional Development Schools", which clarified the responsibilities and tasks of TPDS, including formulation of training plans, determination of training content, selection of tutor teachers, and evaluation of new teachers.

2. Mentoring system

BTT provides every beginning teacher with two mentors, which one is responsible for the teaching skill and the other is for classroom management. The quality of mentors is very important, so BTT system attracts experienced teachers with special funds and provides them with professional opportunities. BTT allocates special funds for mentor teachers in TPDS to guarantee the effective mentoring system. TPDS formulates a budget plan at the beginning of each school year, makes a final report on the use of special funds at the end of the school year, and submits it to the local education bureau.

BTT has created good conditions for the communication between mentors, including the communication and coordination in the same TPDS, the communication between different TPDS, and supervision from expert councils. Through multi-channel and multi-level communication and collaboration, it not only improves the quality of BTT, but also injects new impetus and provides opportunities for mentors.

How to resolve the conflict between teaching and training

Beginning teachers should invest at least half a year in TPDS and other local teacher training institutions, but the real situation is not so optimistic. In some schools, many beginning teachers have to take on the normal teacher workload. In addition, there are also the work of being head teachers or deputy head teachers. For

this situation, some principals have no choice but to express the helplessness of "one radish, one pit". However, new teachers do much more than that. A beginning teacher' schedule is more than teaching and class management, but has a lot of important activities including teacher rehearsal, speech contest, multimedia production, broadcast, classroom inspection and so on. It is normal workload for many beginning teachers in Shanghai. No matter in terms of time or energy, beginning teachers could not take part in BTT wholeheartedly. What strategies can address the challenge?

1. Improve the effectiveness of BTT

The objectives of BTT are vague. For example, beginning teachers are required to adapt to the teacher role. What roles should teachers have? Or for beginning teachers, what roles do they need to adapt to? Some objectives are empty and powerless, and cannot improve the effectiveness of BTT. The implementer need clarify the objectives of BTT and reduce unnecessary courses to reduce the workload of beginning teachers and improve the effectiveness of BTT.

2. Assign professionally matched mentors

The assignment of mentors is not two-way selection, and belongs to the assignment of TPDS or district-level authorities. When the grades and school situation are quite different, mentors cannot provide appropriate guidance. A beginning teacher has a suit mentor or not depends on his luck. TPDS themselves will also recruit certain new teachers, and these new teachers will naturally receive preferential treatment. Teachers from other schools can only rely on their luck for the assignment of mentors. Assigning the suit mentors will allow new teachers to face challenges in teaching and get appropriate professional support.

Summary discussion

In the last decade, the Shanghai Municipal Education Commission has piloted beginning teachers training system to guarantee the teaching profession from the start. During the implementation of BTT system, there are three main challenges including how to ensure an evidence-informed beginning teachers training system, how to resolve the conflict between teaching and training, and how to develop practical skills linked to theoretical knowledge. Strategies to address these challenges include establishing a sound administrative and professional guidance system, setting up expert councils to strengthen professional guidance, forming a daily communicating mechanism, accrediting teachers' professional development schools, building mentoring system, improving the effectiveness of BTT, and assigning professionally matched mentors.

Conclusion and recommendations

After ten years of practice, the Shanghai Municipal Education Commission has decided to re-accredit teachers' professional development schools in 2022, which is a huge and very important project. In order to improve the quality of BTT, a professional institution should be responsible for the accreditation and qualification of TPDS, instead of the Shanghai Municipal Education Commission or district bureaus. The contradiction between new teachers' training and workload is a big

problem that administrators have to deal with, and new teachers' workload should be restricted strictly for the first year. At the same time, TPDS should choose and reorganize the content and teaching methods carefully according to grades and subjects in order to improve its effectiveness and pertinence. High-quality curriculum resources should be integrated to share with all institutions including district educational bureau, educational colleges, teachers' professional development schools, and other stakeholders.

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James Michael Brant

Teacher Care, a Fulcrum for Excellent and Equitable Education and Society or As Goes Teacher Care, So Goes Society

Abstract

Educational reforms come and go; teachers transcend. Teachers shape lives in whatever context they live. The teacher is the one constant, necessary but not sufficient element in the educational process. For teachers to deliver excellent performance, with equity, in the classroom, they must receive sufficient, excellent treatment with equity in their roles in society. They cannot be expected to give what they do not receive. Some countries highly esteem their teachers, with salaries and opportunities to match, for example, Singapore and Finland. The outcomes are observed in the quality of life in those societies. These concepts can apply to any culture, as we are speaking of basic, universal needs and reactions of human beings. The perspective of this study is local, yet global, in that we study individual countries' situations, touching on their social, economic, and educational aspects, but keeping in mind the commonalities of human nature globally. The aim of this paper is to prove that kind and caring action, beginning with teachers and the education system will result in an upward cycle of more such actions throughout society. Methodological approach is mixed. Qualitative research draws on secondary data in the form of a literature review of two case studies: Singapore and Finland. Quantitative data from the educational systems of both case study countries informs the analysis. The significance of this study is the potential societal paradigm shift which could come about by moving the pivotal fulcrum of socioeconomic balance even slightly in favor of our teachers.

Keywords: teacher, care, training, profession, society, equity, recognition, compensation

Introduction

The teacher is the one constant, necessary but not sufficient element in the educational process. For teachers to deliver excellent performance, with equity, in the classroom, they must receive sufficient, excellent treatment with equity in their roles in society. Taking it a step further, even the good and well cared for teacher element is necessary, but not sufficient to provide excellent and equitable education opportunities for students. Society must be excellent and equitable. Everyday life outside the classroom teaches much more profoundly than any classroom lecture. Policies that help the underprivileged show our youth that people matter. The possibility that our future national and global policy makers will be ethically and intellectually equipped to make good decisions concerning equity in their societies and globally, depends upon the quality of education they receive from the well-cared-for teachers of today in a society that provides equitable opportunity to all. This is not the picture of our world today. At some point, there must be a bend in the road for there to be a change of direction. The prioritization of the care of our teachers now may be that point.

The hypothesis of this paper is: Kind and caring action, injected into the system of this world at whatever point, teachers and the education system being a particularly strategic point; will result in an upward cycle of more kind and caring actions throughout society, a domino effect, first carried out and taught by the teachers, then reflected by their students who in turn go out to make a caring and loving society, which teaches by actions the loving and caring attitude and life perspective it learned in school. No matter what profession or trade these students go into, they will effectively be acting as teachers. This will imprint upon their generation and upcoming generations. Furthermore, among each cohort there will be those who go into the formal education system as teachers, who repeat the process. Even if the world around us is not loving and caring today, if we interject this element of love and care for our teachers, also providing for their use, a curriculum which teaches to their students this love and care for others, the effect will ripple throughout the surrounding layers and sectors of society, and on into the future ones.

Theoretical underpinnings

Social constructivist theory is the lens through which we observe the learning curve of not only each case study's education system, but also the whole society around it. Critical education and social education theories also have bearing. The first addresses the need for education as a tool of transformation in society to effect justice and equality (Mellor, 2013). The second refers to the need for ethics-filled social studies curricula to reach beyond mere book learning and imbue the school atmosphere, reflect in the school staff, and extend into every sector of society, for it to imprint upon the lives of the students (Giroux & Penna, 1979).

Research methodology

Mixed method qualitative and quantitative is employed. Qualitative research draws on secondary data in the form of a literature review of two case studies: Singapore and Finland. Aside from this, articles on social psychology are cited which support the rationale behind interventions highlighted in the studies. Quantitative data from the educational systems of both case study countries informs the analysis. The cases were chosen for their relevance to the research theme, making them key cases also holding value for their universality. The developing world has great need of trained teachers as recognized in UN SDG 4.

Good teachers, a common needed denominator

Throughout history, we can follow trends and schools of thought on how to teach effectively: Plato, Socrates, Aristotle, Rome, St. Augustine, St. Thomas Aquinas, the Renaissance, Cambridge, Oxford, Harvard, Horace Mann, John Dewey, Maria Montessori, Paolo Freire… and this limited list mentions only people, places, or times from the Western world. In each context, a common thread was the need for inspired teachers, motivated to teach, who could inspire and motivate their students to even surpass them. What helped the teachers to become good teachers? In this paper, we explore several aspects of teachers' needs and possible ways to

satisfy those needs, in order to help teachers achieve their maximum performance. We will examine:

1. Inspiration and motivation;
2. Compensation and stability;
3. Preparation and ongoing development;
4. Recognition and advancement.

These four domains fit within Abraham Maslow's pyramidal taxonomy of human needs, compensation corresponding to physiological needs, and stability (as in job stability), also relating to safety.

> *There are at least five sets of goals which we may call basic needs. These are briefly physiological, safety, love, esteem, and self-actualization. In addition, we are motivated by the desire to achieve or maintain the various conditions upon which these basic satisfactions rest and by certain more intellectual desires.* (Maslow, 2000, p. 3)

Inspiration and motivation

Vision to see ahead and realize that what one does today will contribute to a better tomorrow drives some people to accomplishment. This corresponds to some of the higher levels of Maslow's pyramid of human psychological development. Conferences, networks, and support groups, can help to maintain that vision. When teachers see that their work can contribute to making a better society, they find motivation.

Preparation and ongoing development

In order to put vision and ideals into practice, teachers need good job preparation. The foundation for a teacher's preparation is usually found in their teachers' university training (normal university), but it cannot stop there, or the teacher will be left behind by the ever advancing new trends and technology of the education profession. A contributing factor to motivation is confidence. Andrew Elliot and Carol Dweck report:

> *A motivational analysis of competence must account for the ways in which individuals' behavior is energized… and directed… that competence is an inherent psychological need of the human being.* (Elliot & Dweck, 2005)

They go on to explain that competence-based motivation produces joy, pride, and self-esteem. When a person feels incompetent, motivation can take a drastic dive exhibited in sadness, shame, and anxiety.

Compensation and job stability

Teachers, like all other citizens of society, have material needs for both themselves and their families. If the teachers' job is poorly paid, they will be fighting an uphill battle, become discouraged and seek other, better paid professions. Closely linked to compensation is job stability. Some countries provide both a high compensation and great job stability for their teachers, the result being a highly effective teaching force and top ratings in PISA or other measuring instruments of educational system effectiveness (Sclafani, 2015, p. 1; Sahlberg, 2011, as cited in

Kager, 2013, p. 77). When teachers' salaries and school funding are dependent upon standardized test scores it is easy for a "teach to the test" mentality to set in. Sahlberg, one of the main engineers of the highly successful Finnish education reform, proposed that testing should be a part of the education process, but not affect teachers' salaries or school funding (Sahlberg, 2011, as cited in Kager, 2013, p. 77).

Compensation, although at a lower level on Maslow's pyramid of human needs, directly affects the higher level of inspiration, idealism, and altruism. Maslow explains:

> *These basic goals are related to each other, being arranged in a hierarchy of prepotency. This means that the most prepotent goal will monopolize consciousness… but when a need is fairly well satisfied, the next prepotent ("higher") need emerges, in turn to dominate the conscious life and to serve as the center of organization of behavior…* (Maslow, 2000, p. 3)

If a teacher is poorly paid and cannot meet the needs of his or her family, those concerns will interfere with whatever idealism the teacher might have in teaching the students.

Recognition and advancement

Everyone needs to be recognized as a valuable part of his or her society, as illustrated in Maslow's pyramid, and in these examples:

Singapore

Singapore and Finland are prime examples of teachers being highly valued, but this recognition goes beyond words. In Singapore, teachers are among the highest paid professionals. The teaching job is so highly esteemed, even coveted, that it is difficult to enter the normal university and once the training is finished, because the job is one of the most highly paid, it is also highly respected. Opportunities for advancement are built into the system, so the job is not a stagnant or boring occupation. The result is a high level of education for Singapore.

> *The quality of the teaching profession is the focus and result of the coherent, systemic education policy in Singapore. (It is) continually improving its policies for preparing, hiring, evaluating, compensating, mentoring, developing, and retaining its teachers.* (Sclafani, 2015, p. 1)

Since its independence in 1965, the average education level has risen from 3rd grade to a required minimum of 10 years of studies in 2015, catapulting it to the top rankings of global education (Hanushek & Woessmann, 2015, as cited in Sclafani, 2015, p. 1). According to a 2004 Singapore survey, the job of the teacher was considered more important than that of doctors or lawyers, as far as its contribution to society (Shanmugaratnam, 2005, as cited in Sclafani, 2015, p. 1).

Finland

Finland also scores at the highest international level in education. In Finland, the teaching profession is highly regarded in society and thus entry into the profession is very demanding and competitive. Finnish teachers are trusted with a fair degree of professional autonomy, carrying the responsibility of local curriculum development. At the same time, they participate in a professional learning community of

colleagues to analyze and improve curricula. The combination of local school control and teachers' responsibility for interpreting and applying the national curriculum in a flexible way, allows for an effective customization of teaching and learning locally (Sahlberg, 2011, as cited in Kager, 2013, p. 77).

More than schooling, caring for people

Finland has invested heavily in education: monetarily and legislatively. The country went from an agrarian economy to an industrial, to becoming a knowledge economy, with a highly educated population, enjoying a high quality of life in a harmonious society. The combination of a caring government, respect for private enterprise and the individual resulted in a strong teamwork which could make the best use of its assets, people always being the most important consideration (Jantti & Vartiainen, 2009).

Key factors in the country's trajectory have been:

- Strong emphasis on education;
- Emphasis on comprehensiveness and equality in education, regardless of age, financial status, locality of residence, sex, mother tongue;
- Long term investment, not expecting or requiring quick results;
- Considering competent teachers as the "starting point" for an effective education system;
- Strong central national guidance, yet respect for each locality's and school's autonomy;
- Flexible education which adapts quickly to the ever-changing needs of society.

All education in Finland is free, from pre-school to university, even doctoral levels. The quality of education is also uniform from area to area, city to city, neighborhood to neighborhood, enforced and supported by the local government of each area (Finnish National Board of Education, as cited in Gross-Loh, 2014). Krista Kiuru, Finland's Minister of Education has said: "Equal means that we support everyone and we're not going to waste anyone's skills" (Kiuru, 2014, p. 1). Teachers are instructed to give equal attention to students, but to particularly support those who need more help. This helps them to be sure that they can develop everyone's talents and potential, without overlooking anyone. Teachers also give instruction in many skills besides academics in order to offer a well-rounded education of life experience. Kids should learn the meaning of life, community skills, learn that they are needed, develop a good self-image, and know that it matters to take care of others (Kiuru, 2014, p. 2).

According to Hanele Cantell from the Department of Teacher Education, University of Helsinki, teachers are the ones trusted to assess the students in school, rather than a national uniform test. She also said that the country considers teachers to be the best experts for curriculum design, since they are the ones in daily contact with the students in the classroom and can see what is working and what isn't. Curriculum is not handed down from some disconnected ministry office (Cantell, 2016, p. 1).

Students' needs

Students need, in some sense, the same things as teachers so that they also can give their best performance. If they are not treated as participants in the learning process, but simply talked down to by dissatisfied, disgruntled teachers in overburdened facilities, they will produce similar results.

> *Human beings avoid being a nothing (rather than a something), a ludicrous figure regulated by others, being manipulated, unappreciated, given orders… an interchangeable man.* (Maslow, 2000, p. 55)

School of life not limited to the classroom

If respect, care, and appreciation are shown to our students, they will be empowered to return it to society, but society must be an example of the ethics taught in the classroom, or if not, the classroom knowledge about ethics and morals becomes fictitious, even ludicrous and unbelievable.

> *What excellence is this that manages to coexist with more than a billion inhabitants of the developing world who live in poverty, not to say misery? Not to mention the all but indifference with which it coexists with 'pockets of poverty' and misery in its own, developed body.* (Paolo Freire, 1994, *Pedagogy of Hope*, as cited in Darder, 2002, p. 1)

In a presentation at the World Forum for Comparative Education in Beijing, Professor Vinayagum Chinapah, long time UNESCO advisor and Chair of the Institute of International Education, Stockholm University, emphasized that to produce such a result as excellence and equity in education and society, education alone cannot solve a society's problems, but it must work hand in hand with social action. If not, education will be sterile in its effectiveness, serving merely as a rubber stamp of approval for the status quo rather than an agent of change and social progress (Chinapah, 2017). Curricula which provide students with opportunities to experience charitable social action are foundational to positive life education.

Critical evaluation

Singapore in 1965 had a 3rd grade average education level. Priority was put on education and teacher preparation. Teachers became respected, and highly paid. Today, Singapore's education level is one of the highest. Prioritization on education has helped to transform this renowned country.

Finland developed from primitive agrarian to an industrial and currently to a knowledge economy, highly valuing each citizen, as reflected in its educational, economic and political systems; social education in its truest sense: caring action, a model to replicate.

Conclusion

Teachers and their care is a strategic fulcrum, or turning point, which can be leveraged in a society to lift it toward meaningful progress. If teachers are cared for and trusted, they will respond by passing this treatment on to their students, empowering them to pass it on to the world. Meanwhile, however, those students are also in the school of real life around them, and so it behooves our societies to

embody those same good values taught, hopefully, in the school buildings. If both "schools" work together toward this goal of making an excellent and equitable world, together with our children, we will reach our goal.

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Impact of COVID-19 on Higher Education: Challenges and Opportunities

Abstract

The COVID-19 pandemic shocked the world. The pressure on students and higher education institutions is high. Universities have been closed, but solutions to continue teaching and learning activities were offered by the online platforms. Hence, the aim of this study was to investigate how university medical students perceive this current form of education. The results of the survey highlighted that most of the students were satisfied with the measures taken by the university during the COVID-19 outbreak and the way the teaching-learning-assessment process took place. However, some negative aspects were reported, such as: lack of an adequate infrastructure for some students, less effective teacher-student communication and interaction, impossibility of performing practical applications, lack of socialization, less objective examination, possibility of physical and mental health problems. The main conclusion is that the students prefer to continue with hybrid model of learning, where the theoretical classes could be online, but practical classes would be face-to-face. Universities, now more than ever, should invest in teacher professional development of their faculty – for teachers to be updated on effective pedagogical methods with or without the use of online technologies.

Keywords: COVID-19 pandemic, face-to-face education, online education, medical students, student survey, challenges

Introduction

> *We cannot return to the world as it was before, but we should consider ways that the right to education, might need to be broadened to encompass fluidity, capillarity and the changing contexts of contemporary societies.*
>
> Sahle-Work Zewde, Chairman of the International Commission on the Future of Education, UN, 2019

Education is "a fundamental human right, a global common good and a primary driver of progress across all the 17 Sustainable Development Goals (SDG) in the 2030 Agenda as a bedrock of just equal, inclusive, peaceful society" (United Nations, 2020, p. 3). The COVID-19 pandemic has caused disruption to education than at any other time in modern history, and has already had impacts on learners and teachers all around the world (Ebner et al., 2020). Education around the world has been suffering many problems due to this pandemic, and students are a significant part of the population who are directly affected.

In the higher education sector, universities have been forced to close the doors in response to the growing coronavirus outbreak, and switched classes to online

learning to keep students' retention and maintain access to learning (The World University Rankings, 2020). A solution to continue teaching and learning activities was offered by online platforms. E-learning tools have played a crucial rule during this pandemic, helping schools and universities to facilitate student learning during the closure of universities and schools (Subedi et al., 2020). Online learning, distance and continuing education have become a panacea for this unprecedented global pandemic, despite the challenges posed to both educators and learners. Transitioning from traditional to face-to-face learning to online learning can be an entirely different experience for students and professors, which they mostly adapt to with little or no available alternatives.

Impact of COVID-19 on higher education

The global outbreak of the COVID-19 pandemic has spread worldwide, affecting almost all countries. The outbreak was first identified in December 2019 in Wuhan, China. The countries around the world cautioned the public to take responsive care. The pressure on students and higher education institutions was high. Schools and universities were closed and examinations postponed in many cases. Classrooms and teaching went virtual and admissions for the 2020/2021 academic year were fraught with confusion (Azoulay, 2020). It was not easy for all members and stakeholders in higher education institutions to transfer education to the distance education system, as it was not easy for families and students to accept that the educational process takes place entirely from home, so it is very difficult for parents and students to accept this direct transfer in the method of delivery for the education system (Rapanta et al., 2020). Additionally, it was very hard to request from physics professors to prepare lectures from the Zoom program, because this method was also new for the students. It was also difficult for all students to accept this shift in which they are required attend a full program of study, lectures and register attendance while they are in front of a laptop or a mobile phone screen (Basilaia & Kvavadze, 2020).

On the other hand, the crisis this has encouraged innovation within the education sector. Countries are started to reopening schools and higher education institutions either based on grade level and by prioritizing exam classes, or through localized openings in regions with fewer cases of the virus. However, given the continued virulence of the virus, the majority of the countries surveyed in May-June 2020 had yet to decide on a reopening date at the time of the survey report (UNESCO-UNICEF-World Bank, 2020). These decisions carry enormous social and economic implications and will have lasting effects on educators, children and young people, their parents and indeed societies as a whole.

Teaching and learning during the COVID-19 outbreak and beyond

The pandemic has pushed the world to dramatically reinvent ways of coping with the **"**new normal". After the initial phase of complete overhaul, it is critical to understand the short and long-term impact and future measures. Can the world emerge from this crisis with a perspective and boost to higher education? An immediate and effective response to the crisis was to go digital. Developing robust online platforms has become necessary to offer continuity in learning. Good

teachers, refreshed curricula and effective tools will ensure students stay involved and active in the learning process.

While adapting to the new changes, staff and students need to be supported accordingly. Universities and higher education institutions should provide a flexible mechanism to teach their practical and theoretical curricula. In this regard, a higher education institution can teach all theoretical programs through the distance education system (Doucet et al., 2020). Online learning has provided the opportunity to teach and learn in innovative ways unlike the teaching and learning experience in the normal classroom setting (Petrie et al., 2020). Regarding practical programs, universities can teach those programs following the in-person mode in the form of very small groups of 4-6 students taking utmost safety and security and applying all prevention and triage protocols (Hampsten, 2021).

Research methods

The objectives of the research

Before the COVID-19 pandemic, practical preclinical and clinical courses at the Faculty of Medical Sciences within the University of Tetova were accompanied by theoretical face-to-face courses. In the spring term 2020, preclinical (semester 1–5) and clinical (semester 6–10) students stayed at home. To make lessons possible, our university decided to implement online learning instead of face-to-face courses. Combinations of synchronous and asynchronous formats (e.g., lectures and scripts on online platforms and "consultation hours" for students' in question) were provided.

Therefore, the purpose of our research is to investigate how the university medical students perceive the current form of education. We aim to find out their opinions about their experiences during the learning process, what they value from face-to-face education and distance education and what they have experienced since the state of alarm was declared in Republic of North Macedonia on 10 March 2020.

The study sample

The study included an analysis of a sample of 220 randomly selected students who studied medical sciences at the University in Tetova during the winter semester of the academic year of 2021/2022. The inclusion criteria for the study were participants between 20 and 23 years of age with at least one year of learning experience. Of all participants, 124 were female students (55.36%) and 96 were male students (43.64%).

The design of the survey

The basic method used in conducting the study was the survey method, which used a questionnaire as a tool. An anonymous online survey assessing the students' opinion about face-to-face and online learning education was created using the Google Forms online application. The survey consisted of five closed questions; the students had to choose between multiple options or rank-order them, using five levels ordinal scales (very good, good, neutral, bad, and very bad). There were also two open-ended questions, which gave students the opportunity to indicate their experiences with online courses and technology devices they found particularly

useful for online learning. Also, there was one open question, asking about what educational model they would like to continue their training with at the university. The limitation of the questionnaire is that respondents on some statements were to tick more than one answer, which depends of their own opinion. Students were invited via email, with information on the purpose of the study and the time it could take to complete the questionnaires. They were also told that their participation was voluntary and they could withdraw at any time. It also contained a web link to the online survey form created by using Google Forms. The survey form was accessible to the students from October 20 to December 20, 2021.The data was exported to Microsoft Excel 2018 and was analyzed by using SPSS (Statistical Package for Social Sciences) version 20 for Windows.

Results

According to the results, 54% of the students never took online courses while 46% of them did it regularly. The items used to assess the online teaching, learning and assessment/examination experience during the COVID-19 pandemic were ranked as **"**good" and "very good" by most of the students. The students who did not give these scores belong to a vulnerable category that requires the implementation of effective measures for their support by the university. Moreover, most of the students (78%) agreed that online learning was well-structured and the level of ambition was good, which means that they could follow the teaching content and did not feel over challenged or unchallenged. At the same time the majority of the students in the study (82%) agreed that materials are adequately available on the portal and lectures are presented with diversity of presentation of lectures on the portal (video, PowerPoint presentations, and online sessions). Half of the students in the study (50%) agreed that the learning methods through the online portal ensure student-to-student and student-to-professor interaction.

Although most of the students (90%) indicated that they have the necessary infrastructure, 60% of them thought that the communication with the professors was not as effective as the face-to-face education. In regard to online assessment/ examination, 82% of the students were mostly satisfied according to their answers. Only 12% of them showed a slight dissatisfaction with the eared grades/examination methods.

Regarding the advantages of combining traditional education with online education, most of the students (83.33%) agreed with the statement, while 16.67% expressed a neutral position. They put "more-flexible-self-paced learning" first, in the second plan "face-to-face communication and teacher-student interaction", and in third place "less time in front of the screen, and more physical activities". The majority of the students stated that they did not feel well-prepared for the practical part of the curriculum by solely participating in online learning, so this opportunity to have the practical courses with direct communication with their assistants and professors was very useful for them.

When asked about the benefits of online education in the future, 70.74% of students agreed that using online platforms motivated them to learn. The students considered that one of the disadvantages of online teaching during the COVID-19 pandemic were the negative feelings of stress or anxiety.

Discussion

The COVID-19 pandemic has created the largest disruption of the education system in history, affecting nearly 1.6 billion learners in more than 190 countries and on all continents (United Nations, 2020). Educational institutions immediately switched to distance learning in light of the national lockdown. As these lockdowns eased, getting school and universities open has been a top priority for many countries, including the Republic of North Macedonia.

The statistical analysis of the survey reveals common positive attitudes among students in regard to the shift to online distance learning. Also, the current study supports the fact that students adapted fast and had positive attitudes towards the change during the pandemic. The obtained results are similar to the results obtained by other researchers (Rizun & Brown, 2020). Also, our results confirmed that medical students prefer face-to-face classes for the practical part of the courses, because the practical applications cannot be replaced by online learning (Iyer, Aziz & Ojcius, 2020). The results showed that by not having the opportunity for face-to-face interaction, most of the students were not satisfied with the educational model of online lessons, which affected their motivation and willingness to following the subjects. Singh and Matthews (2021) conclude that interaction (between students, or students and educators) is an important variable and has a positive effect on student satisfaction.

At the same time, the students in the study prefer hybrid model of learning, because through conversation, speech and debate, a new concept is clarified or a skill is practiced. According to Qian-Hui and Ying (2020), during and after the pandemic, network course resources, network teaching platform, live streaming system and synchronous classroom are still online teaching.

Conclusion

The situation we face is so dramatic and difficult that we cannot afford to be pessimistic. We are facing the biggest changes in education, so one positive outcome of the pandemic is that it will push us to overcome the numerous global educational challenges sooner that any of us expected. The online live classes assumed the role of a “live guide” to motivate students in their learning process and rendered psychological support in stress hours of stringent restrictions. Technology plays pivotal role in upgrading educational processes and outcomes while defining the relationship between technology and education as bidirectional.

We must build narratives for what the new reality could look like. We have nourished the sources that give us hope in rethinking how the world works. Education needs to be at the heart of a post-COVID world. For that future we need boldness of thought and courageous action now.

Although it is too early to judge how reactions to COVID-19 will affect education systems around the world, these are signs suggesting that it could have a lasting impact on the trajectory of learning innovation and digitization. The results of this study provide specific recommendations and best practice for future application of online distance learning. Since the Republic of North Macedonia decided to integrate online distant learning into all future higher education plans, the results of this research would be especially vital for all universities in the country.

Recommendations

Hence, to succeed in the online teaching-learning approach, the crucial elements are as follows:

- To make sure that students are active and not passive learners in front of the screens.
- To establish a close teacher-student relationship, based on availability, friendliness and helpfulness, as this influences students' motivation to learn in a positive way.
- Teachers should look for appropriate ways to develop the learning process of their students and try to increase and motivate them any time.

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Appendix: Sample survey questionnaire

1. How often have you taken online courses before the COVID-19 pandemic? a. Never b. Hardly ever c. Sometimes d. Frequently e. Constantly
2. Which technology devices do you use to connect to your online classes? a. Cell phones b. Laptops c. PCs d. Any devices
3. How do you appreciate the online teaching-learning-assessment experience during the COVID-19 Pandemic? a. Possibility to connect to the Internet b. Availability and utility/efficiency of the online platforms c. The online learning was structured well d. I was able to prepare myself well in advance for the online learning (by script or book) e. Interaction and communication with teachers (teaching courses, conducting laboratories/seminars/other practical applications) f. Assessment/Examination

4. What would be the advantages of combining face-to-face education with online education?
   a. More diversified forms of assessment/examination
   b. Face-to-face communication and teacher-student interaction
   c. More flexibility-self-paced learning
   d. Ability to perform practical applications
   e. Less time in front of the screen, and more physical activities
   f. Direct communication with other students and the possibility of working in a group

5. What would be the disadvantages of combining face-to-face education with online education?
   a. Connectivity and online platform problems
   b. Stress/anxiety
   c. Difficulty for students to adapt to this way of learning
   d. Difficulty for teachers to adapt to this way of learning
   e. Lack of motivation
   f. Use of physical materials

6. What would be the main advantages of online education in the future?
   a. Flexible schedule
   b. Effectiveness
   c. Innovation and engaging ways of teaching
   d. Improved digital skills for students and teachers
   e. Economic savings
   f. Motivation to learn

7. What would be the main disadvantages of online education in the future?
   a. Empathy and adaptation from professors
   b. Inability to carry out practical applications
   c. Less face-to-face communication and interaction
   d. Explanations, questions and doubts
   e. Difficulties in assessing students and providing adequate feedback
   f. Working individually

8. One option for the development of the educational process in the new academic year is to combine traditional (face-to-face) education with online education. What do you think about this option, considering the learning needs of students?

Some of students' responses:

- Mixed teaching combining face-to-face and online lessons so that some days we are at home to study and others at the University for Work.
- My preference is mixed teaching, because it allows us to get to know and handle both methodologies that are important for our future profession as doctors. Besides, it could be a good option to the preference of all students.
- In general, I would continue with the face-to-face model, because face-to-face lessons are much effective to use the materials that we need to get to the practices and that the whole group uses, and we can raise doubts about the work at the time.

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Snježana Dobrota

Preschool Children's Music Preferences for Classical Music and World Music

Abstract

Musical activities in early and preschool age significantly contribute to the overall development of the child. The paper has explored music preferences of preschool children for classical music and *world music*. As a part of the research, a general data questionnaire and music preferences questionnaire were used. The research was conducted in Split, Croatia, on a sample of 126 children of early and preschool age children – three to six years old. The results show that there was no difference in children's music preferences with regard to age. Furthermore, no difference was found in children's music preferences with regard to gender. The obtained results have significant musical-pedagogical implications for the organization and conception of musical activities during early and preschool education. Musical contents for listening to music and singing can include various examples of *world music*. In this way, children will develop intercultural competencies from the earliest days.

Keywords: music preferences, musical activities, early and preschool education

Introduction

Music plays a significant role in the life of every child. The results of several studies confirm that engagement with music significantly contributes to overall development of the child (Jentschke & Koelsch, 2009). Hallam (2010) believes that active music engagement has a positive impact on the personal and social development of the child only in case of positive learning experiences, which has a number of implications for theory and practice of music pedagogy:

> *In early childhood there seem to be benefits for the development of perceptual skills which affect language learning and which subsequently impact on literacy. Opportunities to be able to co-ordinate rhythmically also seem important for the acquisition of literacy skills. Fine motor co-ordination is also improved through learning to play an instrument. Music also seems to improve spatial reasoning, one aspect of general intelligence, which is related to some of the skills required in mathematics. While general attainment is clearly affected by literacy and numeracy skills, motivation, which depends on self-esteem, self-efficacy and aspirations, is also important in the amount of effort given to studying. Engagement with music can enhance self-perceptions, but only if it provides positive learning experiences which are rewarding.* (Hallam, 2010, pp. 281-282)

While some musical abilities are present in children from their birth, others reach a higher level only in older individuals, with longer musical experience. Thus, sensitivity to melodic contour and relative pitch appear already in early childhood, while other musical abilities, such as sensitivity to harmony, develop more significantly only in late childhood (Trainor, 2005). Earlier research has shown that musical abilities change throughout childhood and depend on musical experiences,

such as everyday exposure to culture-specific music, called enculturation (Hannon & Trainor, 2007). Formal music instruction appears to encourage the development of musical abilities by shaping domain-specific perceptual and cognitive representations (Hannon & Trainor, 2007).

Early-age and preschool children are introduced to music through game, singing, listening, playing an instrument, taking part in musical games and counting-out rhymes. Listening to music has special importance in the aesthetic education and children's introduction to the world of classical and traditional music.

The National Curriculum for Early Childhood and Preschool Education in Croatia (Ministry of Science and Education, 2015) encourages the development of eight key competences for lifelong learning: Communication in her/his mother tongue; Communication in foreign languages; Mathematical competence and basic competences in natural sciences and technology; Digital competences; Learning to learn; Social and civic competences; Initiative-taking and entrepreneurship; Cultural awareness and expression. Introducing different musical styles, primarily classical and traditional Croatian music as well as various forms of *world music*, significantly contributes to strengthening the competence related to children's cultural awareness and expression, but also their social and civic competence.

The results of research on children's musical preferences generally show that children prefer almost all musical styles, but that such preferences decrease with age (Brittin, 2000; McCrary, 2000). Consequently, the period of early and preschool education is the optimal time to introduce children to different musical styles, primarily classical music, Croatian traditional music, and various forms of *world music*. Roulston (2006) explored children's preferences and concluded that children show distinct preferences for an eclectic range of music from very early ages, that they prefer rock and popular music, that music listening at that age was characterized by a reliance on diverse technologies, with listening inextricably interwoven with viewing, and that music listening and experiences in the home varied considerably from what was offered in the school and daycare settings.

Peery and Peery (1986) assessed musical preferences of 45 preschool children (mean age 4.7 years). The study incorporated an experimental design with parallel groups. Six classical and two popular pieces were evaluated. All children showed high preferences for all pieces during the pretest. The experimental group received weekly 45-minute classes during which they listened to classical music, sang classical themes, played musical games, learned the names and sounds of various instruments, etc. Posttest results indicate the experimental group preferred the classical selections significantly more than the control group, who experienced a decline in preference for the classical pieces. The authors conclude that repeated listening to music, along with the appropriate methodological design of music listening activities, significantly contributes to increasing children's musical preferences.

Yim et al. (2014) have examined children's musical preference in Hong Kong and in South Australia by applying a data mining technique (Self Organising Maps), which is a clustering method that groups similar data objects together. The sample was composed of 228 young children aged 4-5 years and their parents/caregivers in the Hong Kong Special Administrative Region (HKSAR) of the People's Republic of China and in the Adelaide city of South Australia (SA). The results have shown

that dancing/moving is the most preferred musical activity among all children in the investigation, but dancing/moving is a more preferred activity by children in HKSAR than in SA. More HKSAR children indicated their clear and strong preference in playing instruments. South Australian children are more likely to indicate their least preferred musical activity than HKSAR children.

Arriaga-Sanz et al. (2017) have analysed the musical preferences of children in early childhood education and have tried to determine the learning environment where these preferences develop, as well as to identify both teachers' and families' degree of knowledge of these preferences. The study was conducted on the Spanish sample and a total of 286 five-year-old children, their parents and their teachers participated.

Research on children's musical preferences is mainly oriented toward educational settings, i.e., examining children's musical preferences in school or kindergarten. However, some researchers focus on the home environment and observe the types of musical activities and the impact of the media to which children are exposed at home. Custodero et al. (2003) investigated how parents describe children's engagement with music at home, while Custodero (2006) also conducted in-depth ethnographic accounts of the singing practices of families with young children. The above studies provide an insight into children's engagement with music at home, especially into their singing and listening practices.

Research aim, problems, and hypotheses

The aim of this research is to examine early-age and preschool children's musical preferences for classical music and *world music.*

In accordance with the stated aim, the following research problems were formulated:

1. to investigate the influence of age on the preferences for classical and *world music*; and
2. to investigate the influence of gender on the preferences for classical and *world music.*

In accordance with the defined research problems, the following hypotheses were set up:

H1: *Younger children, compared to older children, show greater preferences for classical and world music*.

H2: *Girls, compared to boys, show greater preferences for classical and world music*.

Method

Participants

The study was conducted in two kindergartens in the city of Split: *Grigor Vitez Kindergarten* and *Marjan Kindergarten*. A total of 126 children of early and preschool age (F=66, M=60), three to six years old, participated in the research.

Research instrument and procedure

For the purposes of the research, a two-part questionnaire was constructed as well. The first part contains questions related to the socio-demographic

characteristics of the participants (gender, age). The second part of the questionnaire related to the research of music preferences which were examined using a personal computer, speakers and 10 musical fragments. The participants' task was to listen to a piece and assess the degree of liking it on a Likert-type scale marking the appropriate emoticon. The compact disc was designed exclusively for the purposes of this research, and the criteria for music selections were the above hypotheses.

A compact disc with five classical pieces was used in the research (P. I. Čajkovski: Trepak (Russian Dance), Nutcracker; J. Brahms: Hungarian Dance No. 5 in G Minor; J. Offenbach: Can Can, Orpheus in the Underworld; W. A. Mozart: Sonata No. 11 in A Major, K. 331, Alla Turca; G. Rossini: William Tell, ouverture) along with five pieces of *world music* (Danilushka & Natasha: Casatschok; Dark Isle Bagpiper: Scotland the Brave; Zorba's Dance (Sirtaki); Will Glahé Orchestra: Clarinet Polka; Akwaaba Traditional African Drum and Dance Ensemble in Bedford). The Cronbach α for the classical music subscale is 0.77, and for the *world music* subscale 0.79. Since the distribution of preferences for music selections differs significantly from the normal distribution (K-S d=.14; $p<0.01$), nonparametric statistics procedures will be applied in further analyzes.

Data analysis

Apart from descriptive statistics (mean, standard deviation, Cronbach α), in data analysis a Chi-square test was used to check whether children's musical preferences differ with respect to gender and age. For data analysis statistic application STATISTICA 13 was used.

Results

As for the average degree of preference for the music pieces, the children rated the highest P. I. Čajkovski: Trepak (Russian Dance), Nutcracker (4.30), and the lowest J. Brahms: Hungarian Dance No. 5 in G Minor (3.87).

H1: *Younger children, compared to older children, show greater preferences for classical and world music*.

To examine whether the preferences for classical music and *world music* differ with respect to children's age, the χ^2 test was conducted. The results indicate that there is no difference in children's musical preferences with respect to age (χ^2=17,96; df=12; p=0,12), which made us reject the first hypothesis.

H2: *Girls, compared to boys, show greater preferences for classical and world music*.

To test the above hypothesis, the χ^2 test was performed. The results show that there is no difference in children's musical preferences with respect to gender (χ^2=4,51; df=4; p=0,34), which made us reject the second hypothesis.

Discussion

Generally, younger children, compared to older children, are more open and flexible toward music in general, and thus toward classical music and *world music*. Such results are in line with the results of the research by Dobrota and Sarajčev (2021), which confirm the open-earedness hypothesis, i.e., children's openness to different styles of music.

The obtained results have significant implications for designing musical activities for children of early and preschool age. Bearing in mind children's openness to unknown and new musical styles, musical activities at that age can be designed so as to include children-appropriate pieces of classical music, traditional music, and various forms of *world music*.

Furthermore, the results of this study did not confirm that girls, compared to boys, show greater preferences for classical and *world music*. Such results are inconsistent with the research results confirming that girls, compared to boys, have more positive attitudes toward music and prefer more diverse musical styles, which can be explained by better music education received by girls (Harrison & O'Neill, 2003).

Pollatou et al. (2004) investigated whether there were differences between boys and girls at the age of five concerning their musical aptitude, rhythmic ability and performance in gross motor skills. The results reveal no differences in musical aptitude and gross motor skills performance, but do show differences in rhythmic ability test results in favor of girls. Considering that rhythmic competence is strongly inter-related with children's motor coordination, the concluding authors' suggestion for the preschool physical education curriculum is to incorporate specific rhythmic activities.

We can conclude that music plays an important role in children's life. Music engagement in the early childhood education includes different activities, such as singing, listening, playing instruments and dancing. All these activities contribute to the development of the children's intercultural sensitivity, especially singing and listening to music. Music is an important media that can contributes to the development of the children's musical mind.

Conclusion

The results of this research have significant implications for designing musical activities in kindergarten. The most important scientific contribution of the research is based on the fact that children of early and preschool age are open to different types of music and that their musical taste is not limited to certain musical styles. Therefore, it is possible to include different types of music in the musical activities of children of this age, provided that such music is appropriate to children's abilities.

It is thus possible to introduce children of early and preschool age into the African musical tradition by singing, playing, and listening to African music. As an example, we can use *Che Che Koolay*, a song originally performed by the Fanti tribe from Ghana but sung all over the world. The mode of the song is minor/modal, and main characteristics of the song is that it is movement/dance song, call and response song, with sixteenth-eighth-sixteenth note patterns. This song can be included in all activities (singing, listening, playing an instrument), but also in a complete project aimed to introduce African civilization. Another example can be the song *Salibonani (Hello, how are you?)* from Zimbabwe.

These songs are suitable for children of early and preschool age, who through the activities of singing, playing or listening get to know African music and culture, which enriches their knowledge, but also develops openness and tolerance for the new and unknown. In this way, in addition to the development of musical abilities

and aesthetic education of children, the development of intercultural sensitivity and intercultural attitudes is also encouraged.

Musical activities as well as artistic activities in general represent one of the fundamental modes of expression for children. Children cannot fully express themselves through speech or writing, but they can express themselves through movement, sound, and art in general. They express themselves, but they also learn in that way.

> *What a child has heard in his first six years of life cannot be eradicated later. Thus it is too late to begin teaching at school, because a child stores a mass of musical impressions before school age, and if what is bad predominates, then his fate, as far as music is concerned, has been sealed for a lifetime.*
>
> Zoltán Kodály, Children's Day Speech, 1951

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Appendix

Summary table: Age

Summary table: Observed minus Expected Frequencies. Marked cells have counts > 10 Pearson Chi-square: 17,9645, df=12, p=,116772						
Age	Music preferences 1	Music preferences 2	Music preferences 3	Music preferences 4	Music preferences 5	Row Totals
3	-0,12	-0,12	-0,12	1,31	-0,96	0,00
4	-0,15	0,85	0,85	0,08	-1,62	0,00
5	-0,27	-0,27	-0,27	0,38	0,42	0,00
6	0,54	-0,46	-0,46	-1,77	2,15	0,00
All Groups	0,00	0,00	0,00	0,00	0,00	0,00

Summary table: Gender

Summary table: Observed minus Expected Frequencies. Marked cells have counts > 10 Pearson Chi-square: 4,51493, df=4, p=,340781						
Gender	Music preferences 1	Music preferences 2	Music preferences 3	Music preferences 4	Music preferences 5	Row Totals
M	0,65	-0,35	0,65	-0,08	-0,88	-0,00
F	-0,65	0,35	-0,65	0,08	0,88	0,00
All Groups	0,00	0,00	0,00	-0,00	0,00	-0,00

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Part 5
Law and Education

René Beyers & André du Plessis

Professional Discretion of School Principals: A South African Education Law Perspective

Abstract

Principals are confronted with an exceptional degree of difficult decisions. One of the key challenges that school principals are facing in many parts of the world today is how to maintain a balance between professional discretion and accountability with the legislative and policy framework in which they must perform their duties. Every judgement call made by a principal will inevitably be questioned. However, without discretionary powers it would be impossible to be a principal. This paper therefore explores the application of professional discretion by school principals by focusing on different components of professional discretion, principals' need for autonomy, discretionary power of principals, principles governing the application of professional discretion, and the factors that influence or limit discretion.

Keywords: professional discretion, accountability, contextual intelligence, principals' autonomy, discretionary power, discretionary principles

Introduction

It is argued by Boote (2006, p. 462) that principals have sufficient professional discretion for certain tasks when they have the ability to make professional judgement and the competence to act on those judgements. Boote (2006, p. 462) further argues that such judgements should be appropriate to a specific context. However, school principals are also situated against the accountability framework they function within (Du Plessis, 2019, p. 98). According to Nieuwenhuis (2007, p. 104), accountability imposes a duty or responsibility on a person, the principal, to behave according to norms and expectations set for his or her actions. In other words, each principal needs to be able to account in a specific context for his or her actions in relation to the standard and expectations set for those actions.

Contextual intelligence refers to a principal's ability to identify contextual factors in a given situation and adjust his or her discretion to influence or act in a situation for the best interests of a learner. This includes the combined knowledge of technical skills and practical know-how (Marishane, 2016, p. 164). According to

Marishane (2016, p. 164), principals who have contextual intelligence could apply professional discretion more appropriately.

The conundrum

Every judgement call made by a principal will inevitably be questioned (Du Plessis, 2019, p. 112). The justification for challenging a principal's decisions may be attributed to principals increasingly being held accountable. Therefore, it is essential to exercise appropriate professional discretion on a daily basis whilst leading and managing a school with contextual intelligence (Du Plessis, 2019, p. 159). Without discretionary powers it would be impossible to be a principal. However, it is important for principals to weigh every decision they make very carefully in order to comply with what is expected (Du Plessis, 2019, p. 112).

Newham (2000, p. 45) and Thorn (2015, p. 3) argue that educators in Australia and America are neither sufficiently trained nor equipped to apply laws and policies in an educational context, nor do they have easy access to legal advice and relevant support structures, which in turn, limits their professional discretion. Thorn (2015, p. 3) emphasised that although most school principals and managers have had some training in school law, they lack the understanding and ability to use this knowledge to develop policies and exercise adequate professional direction. In the South African context, Du Plessis (2019, p. 97) and De Waal et al. (2001, p. 51) concur that principals are not adequately prepared nor trained for the demands of being a principal and do not necessarily know how to perform their variety of roles as set out in the Policy on the South African Standard for Principalship.

What does the literature say?

Exercising discretion or judgement in decision-making is seen as an indispensable part of a school principal's professional duties (Heilmann, 2006, p. 2). Public school principals will continue to be influenced by legislation as they are positioned against a framework of accountability in which they operate (Wallender & Molander, 2014, p. 1). Consequently, for school principals to be efficient in their decision-making they have to continuously evolve and improve their knowledge in terms of education law (Boote, 2006, p. 463). Thorn (2015, p. 3) reiterates that although most school principals and managers have had some training in education law, they lack the understanding and ability to use this knowledge to develop policies and exercise adequate professional direction.

Components of professional discretion

The understanding and conceptualisation of the notion of professional discretion is vital for all principals as it equips them to make the best possible decisions in the best interests of their learners (Boote, 2006, p. 461). According to Wallender and Molander (2014, p. 1), professional discretion comprises of two focus areas. Firstly, professional discretion refers to a principal as a practicing professional with some form of formal education and who is employed by either the government or private sector. Secondly, it describes discretion as the ability of a principal to make appropriate decisions regarding the learners in their care (Wallender & Molander, 2014, p. 1).

Therefore, professional discretion refers to the ability and obligation of a principal to determine what actions are appropriate, and the capacity to take certain actions. Jeffries (2013, p. 76) explains that professional discretion enables principals to "flexibly adapt their practices to the diverse circumstances they face each day".

Discretion exists where rules and regulations do not have a clear indication of how to proceed in dire situations (Heilmann, 2006, p. 9). In this regard Du Plessis (2019, p. 112) recognises that without professional discretion, it would practically be impossible to be a principal. However, trying to manage discretion, which should have no control by definition, is a daunting task (Heilmann, 2006, p. 35). A comprehension of discretion is therefore imperative for a principal's decision-making, particularly where experience, existing laws and policies are inadequate or unsuitable to be applied in a specific context.

Professional discretion and principals' need for autonomy

According to Pearson and Moomaw (2005, p. 37), "granting autonomy and empowering teachers is an appropriate place to begin in solving problems of today's schools". There are two definitions of autonomy when looking at discretionary space as well as discretionary reasoning, namely, judgemental capacity versus opportunities for judgement (Wallender & Molander, 2014, p. 3). Wallender and Molander (2014, p. 3) found that "autonomy becomes stronger the larger the discretionary space, and *vice versa*". Wallender and Molander (2014, p. 3) further emphasise that, due to the discretionary space of professionals who act by virtue of professional authority and power granted to them in their profession, there is a need for accountability. In simpler words, autonomy refers to the educator's freedom and ability to make good judgements (Wallender & Molander, 2014, p. 3).

Du Plessis (2019, p. 98) explains that the space for professional discretion allows a principal some freedom to act or judge independently and that it sometimes even stretches beyond the scope of one's legal power. Du Plessis (2019, p. 98) further argues that creating a space for professional discretion "will allow for more creativity and autonomy by principals as compared to strict impersonal compliance to elaborate rules and regulations". The regulatory environment characteristically includes matters involving public values that apply to all government institutions, such as non-discrimination, and matters involving fundamental values unique to education (Jeffries, 2013, p. 51). Hence, the regulatory environment of South African school principals is linked to democratic values of human dignity, equality and freedom as set out by the Constitution. Therefore, the State and the school must respect, promote, protect human rights and base their discretion on the fundamental rights as included in Chapter 2 of the Bill of Rights (RSA, 1996).

The regulatory environment influences discretionary space, and it also includes a limited set of practises for which there is negligible disagreement about the effectiveness of particular practice as well as decision-making (Jeffries, 2013, p. 51). Molander et al. (2012, p. 217) maintain that the extensive use of professional discretion in educational practice can challenge the rule of law (equal treatment, just administrative action, predictability and legality) as well as the implementation of policies. In conjunction with Molander et al. (2012, p. 217), Jeffries (2013, p. 51) argues that there are principals who are simply incapable of using adequate professional discretion. It is therefore important that a principal must not abuse his

or her discretionary power in bad faith (De Waal, 2000, pp. 44-45). Ingersoll (2003, p. 5) believes that principal empowerment is arguably the solution to problems in public schools and these problems can be addressed by decentralizing schools and increasing discretionary power and autonomy to principals and educators. The proviso would be that principals have the necessary competencies to exercise their discretion appropriately.

Discretionary power of principals

In South Africa, the High Court supports discretionary powers of principals in dealing with disciplinary issues and the promotion or retention of learners (Clarke, 2008, p. 4). Clarke (2008, p. 4) reiterates that where matters are left to the discretion of a principal, and where his or her discretion has been *bona fide*, then the court will not interfere with the result. However, De Waal et al. (2001, p. 156) argue that:

> *[the] bona fides of the author of an administrative act cannot change an invalid act into a valid one: corporal punishment can, for example, never be condoned.*

According to Molander et al. (2012, p. 221):

> *the entrustment of discretionary powers is essentially connected to the demand for justification and to the expectation that those who are granted such powers have the will and the ability to justify their judgments, decisions and actions.*

Du Plessis (2019, p. 159) explains not only do principals have discretionary power, but that they are often compelled to exercise this power, particularly in a context where the safety of learners or educators is at risk. If a principal has discretionary power, he or she is under obligation to justify his or her decisions, judgement and action with reasons that others can understand, accept or reject and he or she can be sanctioned if such decisions were not rational (Molander et al., 2012, p. 221). Molander et al. (2012, p. 221) further explain that accountability measures are strategies for making principals with discretionary power accountable.

Molander et al. (2012, p. 221) emphasise that there are two ways of making the use of discretionary power more accountable; first by reflecting on structural measures that affect discretionary space and secondly by epistemic measures that challenge discretionary reasoning. Du Plessis (2019, p. 159) argues that discretionary powers of principals are limited and contribute to the challenging nature of making effective decisions. Notwithstanding the above, discretionary power is a fundamental component when making decisions; hence it would be impossible to be a principal without this power.

Principles governing the application of professional discretion

Martin (1995, p. 241) explains that there are four important principles that govern the application of professional discretion by school principals. Firstly, principals' decisions must be according to the dictates of the law. Secondly, principals must not fail to exercise or otherwise avoid discretion granted to them. Thirdly, the discretionary powers must not be abused or used excessively. In this regard De Waal (2000, pp. 44-45) stresses that it is critical that principals do not act in bad faith or misuse their discretionary power. Lastly, discretion must not be used for purposes other than those dictated by law.

Molander et al. (2012, p. 217) argue that for principals to be effective in their decision-making they have to construct their discretion around three central

principles of the rule of law. Firstly, principals should make sure that the enforcement of their decision-making is predictable. However, discretion is a source of variation, and extensive practice of professional discretion can create unpredictability. Secondly, a principal's actions must be within the framework of the law. It is thus imperative to note that the extensive use of discretion can influence personal reasoning. However, principals should take cognisance of Section 9 of the Children's Act 38 of 2005 which specifically maintains that "in all matters concerning the care, protection and well-being of a child, the standard that a child's best interest is of paramount importance must be applied". Furthermore, principals must give due consideration to this principle when making any decision (acting *ultra vires* must be justifiable) affecting a child or which may lead to some aspect of neglect (Du Plessis, 2019, p. 102). Lastly, principals should apply their discretion equally (Molander et al., 2012, pp. 217-218). Therefore, it is clear that tension exists between professional discretion and the principles of the rule of law.

Factors that influence discretion

Principals are confronted by competing demands of external and internal forces in their decision-making. Internal forces may include a principal's knowledge, experience and personal-belief. Heilmann (2006, pp. 3, 7) argues that principals base their decisions on several factors, such as case facts, personal values, contextual factors and school and divisional policies. Although, the level of discretion could be limited by external factors, there is space for a principal to go beyond these factors if they choose to do so (Heilmann, 2006, p. 120). However, according to Molander et al. (2012, p. 218), it is difficult to predict discretion because outcomes of discretionary reasoning can differ due to internal and external forces. Molander et al. (2012, p. 218) argue that the same case can be judged differently at different times, different situations and by different persons, even if it is an unchanged case and the case has been handled in a thorough, conscientious and reasonable manner.

In many cases, a principal's values encourage them to make the best possible decisions. However, values can also influence their judgment negatively and not be in the best interests of learners. In addition, some principals find it challenging to exercise adequate professional discretion due to a lack of competencies, a lack of self-control and a lack of independence (Boote, 2006, pp. 465-466). Competencies are necessary to apply appropriate professional discretion, although competencies alone are not sufficient enough to develop professional discretion (Boote, 2006, p. 466).

External factors, such as laws and policies, may restrict the space of autonomy of a school principal in the South African context. Principals regularly find themselves in a position where their judgements or decisions may require them to contradict the law and their discretion should then be guided by Section 36 of the Constitution. This section governs factors that should be considered when limiting a right, such as the democratic values of human dignity, equality and freedom. As indicated in Section 36, consideration should be given to

> *the nature of the right, the importance of the purpose of the limitation, the nature and extent of the limitation, the relation between the limitation and the purpose, the availability of less restrictive means to achieve the purpose* (RSA, 1996).

Constitutional rights and freedoms are not absolute; they have boundaries set by other rights and by important social concern such as public order, safety and democratic values. However, as explained by Prinsloo (2015, p. 47), if a limitation to a right can be justified in accordance with the criteria in Section 36 of the Constitution, it will be constitutionally valid. All these factors must be taken into consideration by principals when deciding what is in the best interests of learners. In the end, these forces affect the decision-making process and could turn into everyday working habits.

Marishane (2016, p. 164) argues that the context in which schools and the school leadership interact is ever changing. A school's context is shaped by many internal and external factors which influence the principal's behaviour and discretionary power and to which the principal must adapt. Marishane (2016, p. 164) explains that among the contextual factors which influence learners' learning and achievement are the school's climatic conditions, school safety and the school's teaching and organisational structure. External factors may also include technological advancement, socio-economic conditions and accountability systems. It is clear that principals find themselves in varied contexts and therefore, it is important that principals develop contextual intelligence in order to exercise adequate professional discretion to matters relating to legislation (Du Plessis, 2019, p. 102).

Concluding remarks

Existing literature suggests that although most school principals and managers have had some exposure to education law, they lack the understanding and ability to implement this knowledge, formulate policy and exercise appropriate professional discretion in the educational environment. Without the necessary legal knowledge, it would be almost impossible for principals to be contextually intelligent. Numerous authors have made contributions with regard to principals' obligations and the fact that they are confronted with situations in which they are expected to apply their legislative and intuitive judgement. However, it appears that there are principals who are simply incapable of using adequate professional discretion, due to a lack of understanding thereof.

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ECCE Centre Managers' Understanding of Instructional Leadership in Rural South Africa

Abstract

The purpose of this qualitative paper is to explore Early Childhood Care and Education (ECCE) centre managers' understanding of instructional leadership. Leadership skills are sometimes developed on the job. However, instructional leadership requires vision, a sound managerial style, relevant knowledge, skills, organisational acumen, and self-development. While these skills fall under management rather than leadership, Early Childhood Care and Education centre leaders in rural areas must still ensure that their centres function smoothly. Due to the minimal research conducted on the Early Childhood Care and Education centre managers' understanding of instructional leadership of rural ECCE centres in South Africa, the study aims to highlight the challenges, knowledge, practices and support provided to ensuring instructional leadership is achieved in the centres. A qualitative research approach was conducted in the Early Childhood Care and Education centres in the Black settlement areas of the Gauteng Province. Five centre managers were purposively selected from five rural community settings and interviewed using face-to-face semi-structured interviews to generate data. Data were thematically analysed to get themes and subthemes. Findings reveal that Early Childhood Care and Education centre managers' understanding of instructional leadership was constrained by uneven funding, lack of support and training in ECCE centre management. The conclusion is that most managers rely on untrained, poorly remunerated practitioners for the daily operations in the centre. For Early Childhood Care and Education centres to be well managed for sustainable development, well-trained, informed, visionary, experienced, and critical-thinking leaders and practitioners are needed. The study may be helpful to centre managers, policy-makers and other stakeholders.

Keywords: centre managers, leadership and management, Early Childhood Care and Education, ECCE centres, instructional leadership, professional development

Introduction

This paper is based on the findings of a project carried out in ECCE centres on instructional leadership in rural South Africa. The new policy framework introduced aimed to transform the ECCE schooling system (Christie, 2010). According to Pansiri (2008), instructional leadership is an active professional collaboration between teachers/practitioners for effective curriculum implementation and learner improvement. Similarly, instructional leadership focuses on achieving school goals, curriculum implementation, teaching and learning and improving the general education and learning environment (Walker & Hallinger, 2015). The implication is a direct connection between instructional leadership and teaching and learning. The argument is that instructional leaders are responsible for ensuring teaching and learning and educational resources are accessible to every learner in the centre. Among others, the argument is that spatial resources are not provided in the context of South African ECCE centres, requiring ECCE centre managers to be innovative

to achieve centre goals. Instructional leadership practices require identified performance practices of ensuring the requisite resources are made available by instructional leaders bestowed with administrative powers, authority and allocated funds for facilities that promote teaching and learning. Not much-researched evidence is available on instructional leaders in rural ECCE centres in South Africa. Most research done is on inequities in resource allocation and challenges of teaching and learning (Maharaj, Robinson & McIntyre, 2018). Instructional leadership, in this paper, assumes that ECCE centre principals are in authority and can ensure teaching resources direct the centre towards the achievement of defined objectives. The assumption is that ECCE centre leaders can manage the centres by affording practitioners and learners support, and by providing educational resources (Piot & Kelchtermans, 2016) to ensure effective teaching and learning in the centre. The challenge, however, is in educational disparities in South Africa's educational landscape, notably in respect of instructional leadership, and South African ECCE centres' contextual factors.

Managing ECCE centres

ECCE centres in the South African rural context operate under challenging conditions due to the historical background, budgetary constraints, role expectations, and education status (Nkambule et al., 2011). These aspects constrain the achievement of instructional leadership and the community's expectations. The constraints need to be removed to enable the centre managers to connect theory and practice to merge the children's worlds without compromising their learning. Managing ECCE centres in rural areas and informal settlements have a range of problems that include inadequate infrastructure, under-trained and demotivated educators, low expectations and poor skills in instructional leadership. The context of ECCE centre management is complicated by changes in centre managers' roles requiring professionalism and qualifications (Van der Westhuizen & Van Vuuren, 2007). To address the problem of instructional leadership for ECCE centres, the Department of Education in SA introduced leadership and management programmes to capacitate principals with leadership skills. However, ECCE centres were not included in the programme because they fall under the Department of Social Development, not funding professional development. Most rural ECCE centres are informal but some are registered under the Department of Social Development to get sponsorship. These centres enrol Pre-Grade R children and offer programmes designed for children between 0-4 years and 5-6 years of age. Still, the practitioners who operate in ECCE centres are without proper documentation, untrained and unqualified.

ECCE centre managers/principals

Many countries have ECCE centres but refer to ECCE leaders differently due to allocated responsibilities. For example, in South Africa, ECCE leaders are referred to as principals. In countries like Finland and Germany (amongst others), leaders may be called the director, while some may refer to them as managers. There is a vast difference in the context of ECCE centres in rural areas and those in urban settings, and instructional leadership in ECCE centres require knowledge of children

and effective communication with stakeholders (Harrison, 2020). The ECCE centre managers own one or more centres but are unqualified, old and not keen to advance themselves further, professionally and academically. These managers are mothers and grannies who together with parents in the community, were struggling, and saw the centre development as an opportunity to alleviate their struggles. Though employed, the parents cannot afford to pay fees for their children to go to formal ECCE centres far from their homes. The centre managers needed money to survive and decided to establish informal ECCE centres. To centre managers, the rural ECCE centres are a business opportunity benefitting both the employed mothers and the centre principals who are retired but available to look after children (Modise, 2019). The ECCE leaders managing the centre love children and have a deeper sensitivity level, but lack curriculum knowledge to ensure practitioner and learner support. They require training from the government and non-governmental organisations to provide for the needs of practitioners and learners. There is a need to develop their skills to fulfil job responsibilities and the specialised needs of rural ECCE centres. Prepared leaders are more effective and may use a variety of approaches. Understanding instructional leadership practices would help improve leadership skills.

Practitioners' professional development

Most ECCE centres locally and internationally engage in professional development, except the informal ones. Equipping centre managers with instructional leadership skills may enhance teaching and learning, and improve their leadership skills. Professional development activities such as "in-service" training programmes and workshops depend on the availability of resources and support in the area. They are linked to ECCE centre goals for improved practice. According to Modise (2019), the optimal leadership of ECCE centres may be carried out by the government and non-governmental organisations to equip ECCE principals with the ability to lead and turn around ECCE centres. Instructional leadership cannot be acquired if there are still disparities in support and contextual factors (Walker & Hallinger, 2015). Instructional leadership requires providing the best possible resources to ensure a safe and secure ECCE sector and active professional collaboration for effective curriculum implementation and learner improvement (Pansiri, 2008). The implication is a direct connection between leadership and teaching and learning in an education setting (Xaba, 2012). Teaching and knowledge geared towards a shared vision and quality, no matter the context, should emphasise developing a shared vision (Ngcobo & Tickly, 2010). The guiding principles of policymakers should be for constant professional development for problem-solving. The conditions under which centre managers operate should improve centre practice and understanding to enable the integration and application of content knowledge to real-life situations (Campbell & Gross, 2012).

Research design and methodology

This empirical research explored ECCE centre managers' understanding of instructional leadership in ECCE centres in rural South Africa, addressing ECCE centre managers' understanding of instructional leadership at an ECCE centre. How

they practise instructional leadership? The centre managers' challenges? And what leaders want to be changed regarding ECCE centre-leadership. The qualitative case study research sought to understand the research problem from the local population's perspectives (Hammarberg, Kirkman & De Lacey, 2016). Five principals owning ECCE centres in different rural community settings were interviewed using semi-structured research questions. The interview questions extracted insightful responses about their understanding of instructional leadership. Relevant ECCE documents were analysed to gain a deeper insight into instructional leadership in ECCE centres. The qualitative approach enabled the researchers to better understand ECCE managers understanding of issues within a specific context promoting understanding of instructional leadership practices and roles of ECCE managers (Hammarberg, Kirkman & De Lacey, 2016).

Theoretical framework

The accountability theory guided the study because instructional leadership is an accountability function that seeks to improve the management of ECCE centres in a country. Themes emerged from the research questions and were corroborated by the literature consulted. The theories illuminated the constructs under investigation, conveyed, described, predicted and explained meanings of issues under study (Boyatzis, Rochford & Taylor, 2015). The ontological perspective of a phenomenon being meaningless unless people give sense to it was best understood through the ECCE centre managers' interpretation and analysis of instructional leadership practices. Epistemological knowledge supplied from different views and beliefs of centre managers was rational, justified, and truthful (Wieczorek & Manard, 2018). The theoretical framework helped explain ECCE principals' understanding of instructional practices. Quality and excellence in education require leaders and managers to implement instructional leadership to ensure effective teaching and learning and to satisfy the learners' expectations and needs through conditions necessary for achieving desired outcomes.

Discussion

The first question was about ECCE centre managers' understanding of instructional leadership at an ECCE centre. The theme that emerged was ignorance regarding instructional leadership. Their understanding of instructional leadership was equated to owning more centres, indicating being unclear about their instructional leadership role. They, however, made administrative decisions that kept their centres sustainable and ongoing.

The second question was on how they practised instructional leadership elicited a theme of Ubuntu. The centre managers acted with care and sensitivity towards children, and the community appreciated their service. The centre managers allowed children whose parents worked until late to stay in their centres until they came from work, caring for their children like family members, just like a mom or granny would do.

The third question was on the centre managers' challenges brought about by lack of support for ECCE centre managers. Responses highlighted a lack of funding for their practitioners, centres and not for them. They believed that the

empowerment of the practitioners would enhance professional skills that would lead to skilled practitioners who would open up new centres and practice instructional leadership to serve the community.

For the fourth and last question on what principals would want to do differently in their ECCE centres, the theme was government funding and remuneration of ECCE staff. They appreciated the Department of Social Development's provision of nutrition to Grade R children. However, they felt that the Government's policy of remunerating Grade R practitioners' schools should apply to the Grade R practitioners in the centre. The non-remuneration of ECCE centre practitioners was considered unfair.

Conclusion

Since there is limited research on leadership practices in ECCE centres in South Africa, it would be beneficial if researchers conducted similar studies to find answers to centre managers' understanding of instructional leadership in ECCE centres. Principals need instructional leadership skills to improve performance in the ECCE centres. The quality of instructional leadership in rural ECCE centres learning depends on the quality of the learning opportunity and support centre managers are provided with, as well as the centre. Professional training and development improves leadership skills. Ubuntu should be central to the school's social context. ECCE leadership serves as a basis for education and fosters an interdependent and mutually beneficial connection between individuals and communities.

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Part 6
Research Education & Research Practice

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Institutional Autonomy and Academic Freedom in the Light of National Regulatory Frameworks: Glance at Hungary and South Africa

Abstract

Having reviewed several pieces of strategy documents, policy papers, and literature, we concluded that there is no uniform definition of either institutional autonomy or academic freedom (AF). Many different points of view determine the interpretation of these terms. Furthermore, the policymakers (e.g., governments, legislators) can ignore the theories connecting to autonomy and AF and separate from them the legislation-level realization. This paper aims to overview different interpretations of autonomy and AF, highlighting the most important standpoints and presenting how autonomy and AF are realized in the national legislation. Considering the limited length of this paper, we focus on our respective countries, namely Hungary and South Africa. Our previous findings show that in many aspects, our countries face similar challenges despite the different historical antecedents. In previous research we compared the factors, which can influence research activities, however, we did not investigate the legislative framework. To that end, in this paper, we go further and look specifically at legal frameworks within our respective countries. Our results illustrate that without a homogenous content, the State may use the concepts of autonomy and AF in its legislation as it sees fit. This in turn may lead to autonomy and AF or some of their components, while being formally safeguarded, they may lose the guarantee character that corresponds to their actual content.

Keywords: institutional autonomy, academic freedom, fundamental rights, constitutional warranties

Introduction: Interpreting autonomy and academic freedom

It is our stand that institutional autonomy and academic freedom (hereinafter: AF) are neither the same concepts nor separable. However, their link depends on the interpretative space, especially the national characteristics and the historical context. This would explain why several scholars use various approaches and focus on different elements. Moreover, sometimes the same researcher concludes different results in different decades. To examine autonomy and AF, we chose the holders of

these rights as a central focus point. As evident, the uncertainty of these terms' interpretations is rooted in that the holder of autonomy and AF can be either the organization, the community of the academics, or the individuals at the theoretical and practical level. In connection with the autonomy—AF relationship, we also argue that one is a condition for the other and neither can be achieved without the other. AF is based on the self-regulation of the academic community, which must (also) be guaranteed at the institutional level. Institutional autonomy without community can only be formal since both require guarantee legislation. Therefore, the legislation can serve as an indicator for examining the application of autonomy and AF.

Exploring autonomy and AF, scholars emphasized that "the concept of 'university autonomy' is highly complex and multidimensional, and it covers a range of aspects related to university operations" (Matei & Iwinska, 2014, p. 18). In their approach, the term includes scientific issues, curriculum design, educational methodology, internal financial management, and strategic planning (Matei & Iwinska, 2014). Esterman and colleagues (2011), who compiled the so-called European University Autonomy Scorecard, understand organizational, financial, staffing, and academic autonomy as elements of autonomy. According to Karran (2009), teaching, research, self-governance, and tenure are considered autonomy components. The rapid change of this term's consideration is well shown if we compare what Karran and colleagues (2017) think about it. The authors consider institutional autonomy as one of the criteria for measuring AF beside freedom of teaching and research, self-governance, tenure of teachers and researchers, and the exercise of rights guaranteed by international agreements. Thus, while Karran (2009) had previously considered teaching and research part of autonomy, he later listed them all side by side as part of AF (Karran et al., 2017).

The picture is further complicated because scholars argue about the holders of autonomy. According to a theory, the source of individual (teacher, researcher) autonomy (e.g., AF) is institutional (university) autonomy, whose role is to ensure the conditions of individuals' academic freedoms and enforcing its warranties (Berdahl, 1993). Offering a different approach, Berg (1993) states that AF can be imagined only in the community of fellow scientists. The rights deriving from it can only be exercised collectively. In this context, university autonomy is the medium of interactions between individuals and the community (Deák, 2013, p. 39). In contrast to these stands, Kocsis (2011) argues that autonomy is not the source but the result of the individuals' AF, and also provides a framework for AF.

The relationship between autonomy and AF is an important part within international documents regarding HE. Both the Magna Charta Universitatum (1988) and the Bologna declaration underline that teaching and research are inseparable. They also declare that freedom to perform these academic activities is an essential principle of HEI's life and a fundamental requirement for fulfiling their mission. Ensuring free teaching and research is the responsibility of both States and HEIs. More than two decades later, the Magna Charta Universitatum 2.0 (2020) confirmed the previous declaration and highlighted three key elements:

- the intellectual and moral independence of every political influence and financial interest;

- the duty of the governments, the societies, and the HEIs itself to save this independency rigorously;
- the importance of critical thinking.

There is no uniform interpretation of AF. However, recently, Kováts and Rónay (2022) have attempted to summarize the concept's key elements. Based on the UNESCO (1997) and AAUP (1940) resolutions, the authors found that these elements are:

- the right to teach;
- the right to research;
- the right to disseminate knowledge;
- the right to participate in shaping the academic community.

Finally, it is necessary to mention the UNESCO statements (1997) referring to unity of autonomy and AF:

> *17. The proper enjoyment of academic freedom and compliance with the duties and responsibilities listed below require the autonomy of institutions of higher education. Autonomy is that degree of self-governance necessary for effective decision making by institutions of higher education regarding their academic work...*
>
> *18. Autonomy is the institutional form of academic freedom and a necessary precondition to guarantee the proper fulfilment of the functions entrusted to higher-education teaching personnel and institutions.*
>
> (UNESCO, 1997, chapter V, subchapter A, points 17-18)

Discussing the relationship of autonomy and AF, Matei and Iwinska (2018, p. 349) expound that the two terms "are not binary, yes-or-no variables. They are not one-dimensional either". Contrary to the requirements clearly stated by UNESCO (1997), AF can be and often is limited in practice at the expense of autonomy. In addition, increasing autonomy does not in itself necessarily increase AF, and in some cases leads to a reduction of AF. Kováts (2013) illustrated this with four models, which exist only in theory. The models demonstrate clearly that a low level of AF can be imaginable at a HEI with almost full autonomy. The following are the Kováts' models (2013, p. 53):

- both autonomy and AF are low by the *Napoleon* model;
- autonomy is low but AF is high by the *Humboldt* model;
- autonomy is high but AF is low by the *Corporate* model;
- both autonomy and AF are high by the *Balancing* model.

While the restrictive efforts from the political side tend to lead to solutions reminiscent of the Napoleonic model, the rise of managerialism has increasingly led to the corporate model. Without sufficient guarantees or if the guarantees are not applied correctly, this often poses a real threat to AF. Indeed, if legal safeguards are limited to institutional autonomy, institutional management is not adequately constrained in its actions against AF (Kováts & Rónay, 2022).

Legal frameworks

Hungary

In the constitutions of EU states, the guarantee of autonomy also appears in most cases alongside AF. At the level of international documents, AF is addressed in

HEIs, but also through them to teachers, in terms of freedom of research, teaching, and training whose freedom must be guaranteed (MCU, 1988).

In the Hungarian constitution (the Fundamental Law of Hungary), certain elements of AF are only partially and unevenly reflected, while institutional autonomy is essentially unmentioned. Both right to teach and the right to research are guaranteed only in general terms. Neither right has a holder, so it is impossible to determine whether it is the institution, the individual (scientist), or the community. The exclusive right to evaluate scientific research belongs to those who carry out scientific research and is therefore addressed to the individual and the community. However, both the Fundamental Law and the Higher Education Act grant autonomy in the content and methods of research and teaching only for HEIs (there is no mention of research institutes not operating in HEIs). Individual right to teach for HEI lecturers is only guaranteed by the Higher Education Act and only in respect of teaching according to a world view and values. The Higher Education Act also does not mention the right to research of HEI lecturers. Finally, there are no legal warranties either in the Fundamental Law or the HE Act for the right to disseminate knowledge and participate in shaping the academic community.

Regarding the fact that Fundamental Law ensured the autonomy in teaching and research by choosing subjects and methods only for the institutions, it makes it possible to decrease the AF of lecturers and researchers. This legal environment provides the basis for running either the Napoleonic or the corporate model. Hungary is currently undergoing a so-called model change, in which almost all former state HEIs are being privatized. As a result of this process, each HEI will be run by its own foundation, governed by a board of trustees (BoT) consisting of life-long government appointees. Increasing institutional autonomy has been one of the watchwords of this process, but it also carries the danger of serious erosion of AF.

Since the fourth element of AF, the right to participate in shaping the academic community, is not guaranteed, it is also not guaranteed that the institution is led by a person authorized by the community or by its representative body (i.e., Senate). If the institution is the holder in terms of the content and methods of research and teaching, then who represents it is of particular importance. The BoTs of the institutions privatized in the so-called model change have been given the absolute right to remove essentially any Senate powers. They can thus select the rector, handpick any other academic leader, remove existing management powers, and establish all internal rules, including those that affect teaching and research.

In this way, neither collective rights nor collective self-regulation is enforced. All this is burdened with the absence of guarantee rules, which shows that the increase in university autonomy during the model change is not obvious. Namely, it is not institutional autonomy that has increased, but it was a decentralization of the powers of the maintenance authority, giving it to the BoT appointed by the State. Although BoT has no legal responsibility, it has the empowerment to take off the right of self-regulation of the academic community. Therefore, there is an additional twist in the Hungarian regulation, making the new model seem to align with the corporate model. While, according to the government, institutional autonomy increased in the new model, indeed the strengthened power is ensured for the maintaining foundation's boards of trustees and not directly for the HEI management. In other words, the broad powers have not been given to the HEIs but

have been transferred to the body stepped in the state's place, i.e., a supreme body, by reducing their existing rights.

South Africa

As already indicated earlier, academic freedom can be viewed as autonomy without external interference to academic activities such as teaching and research. In South Africa, AF and autonomy of scientific research are explicitly embedded in the Constitution under the freedom of expression. However,

> *there is a debate whether there is a threat to the constitutionally guaranteed academic freedom in South Africa. This comes from the background that universities often function as centres of political and intellectual dissent, and regimes are thus reluctant to allow institutions the freedom and autonomy that may contribute to instability.* (Kori, 2016, p. 45)

As described in scholarly literature (Kori, 2016) post-apartheid South African constitution and thus the State assured academic freedom and implemented framework based on cooperative governance. The new democratic nation embraced the framework where both the State and the HEIs were supportive of each other collaborating towards a common vision. However, within a short timeframe this framework was subverted and increased influence was shifted to the State allowing its interference in academic decision-making and as a result in AF.

The adjustments were implemented to the Higher Education Act of 1997 due to declared mismanagement and misuse of the institutional autonomy. The changes were implemented maximizing Minister power to establish, combine, and close public HEIs in consultation with the Council on Higher Education (Kori, 2016). As Kori further explains, the Higher Education Act also mandated that up to five council members of each institution be ministerial appointees, which granted the State an additional level of control. As claimed by the past Minister of Education, Naledi Pandor, the institutional autonomy cannot be unrestricted and must be linked to public accountability (Habib et al., 2008). One could argue that intellectually free HEIs where AF in teaching and research is respected are better positioned to fulfil their accountability to society. Yet, we need to be mindful that individual AF to teach and research is affected by HEIs, which provide institutional support and funding.

Another wave of changes came with new ground rules for funding and power allocated to the Minister to intervene in institutional activities including

> *... a new enrolment planning framework, new quality assurance and accreditation requirements, control over an institution's programme and qualification mix, restructuring through mergers and incorporations and a proposed central applications process.* (Kori, 2016, pp. 50-51)

Since HEIs are dependent on government funding, the State has undeniable power to influence institutional activities and make decisions based on a political agenda.

In 2010, the Academy of Sciences of South Africa (ASSAf) brought forward concerns regarding the interference of the State in AF through government policies, leverage of private sponsors with own agenda, and the observed obstruction of freedom of speech within some HEIs. As evident from the ASSAf (2010) statement:

> *... these concerns suggest that the values entrenched in the constitution and in education practice are being eroded by government policy, funding agencies, sponsors and donors, and by institutional management... Furthermore, ASSAf believes that researchers and teachers within higher education and the research community at large should be free to follow their own ideas, arguments, insights and findings, conditional only on the avoidance of scholarly misconduct such as plagiarism, falsification of data and unethical research practice.*

Ten years later, the situation did not improve, making the statement as valid. In fact, further political interferences and even attacks were recorded during the pandemic, especially towards freedom of scientific enquiry (ASSAf, 2020).

Conclusion

As evident from the findings, AF is not based on actual facts or definitions but rather on the desired interpretations. Both contexts showcase that autonomy is not a value in itself; it can only be understood in conjunction with AF. AF is only fulfilled if the scientific community has the right to self-regulation, which is not a case in both countries under investigation.

Although the international documents express the unity of autonomy and AF as a requirement, the Hungarian constitutional legislation separates them. In essence, it speaks only of certain elements of AF, guaranteeing only the research part of it in full and relegating the educational part to the level of the law, thus opening up the possibility of further restrictions. The freedom of education is interpreted narrowly in the Fundamental Law, which only defines the institution as the holder of the content and methods of research and teaching, without granting even the narrowly interpreted right to the individuals (lecturers, researchers).

In case of South Africa, AF has been gradually decreasing and State control systematically increasing. From the original framework of partnership designed by the new democritised nation in 1994 to gradual lesser position of a partner and a greater position of a subject to the State. The observed tendencies suggest that by putting in place different strategies and structures, the State decides on the curriculum, research projects and programmes to be funded, as well as academic free speech, just to mention a few. The legal framework shifts reported in both contexts may represent broader global changes worth exploring.

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Disruptive Forces Towards Innovation in Higher Education Institutions in 2022 and Beyond

Abstract

A new epoch for humankind has started in most, if not all sectors of life, including the education sector. The question that seeks to be answered is whether the new period that started with the commencement of the Covid-19 pandemic, often referred to as the "new normal", is and will be characterised by less favourable education conditions or not. This paper explores a number of external disruptions, some associated with the pandemic, as possible catalysts towards an improved higher education system. Simultaneously, the function and necessity of internal disruption towards student mobility sustained innovation is considered. Despite the often-hostile nature of disruption, it can lead to much-needed or long-awaited innovation. The disruptive forces discussed are firstly alternative modes of delivery of university programmes, and secondly the mobility of foreign students. Thirdly, the value of microcreditialing as significant disruptive force for traditional universities necessitates a paradigm shift for policymakers. Within the context of a higher education institution, it can be predicted that all three of these possible innovations will be met with some level of resistance, despite the magnitude of the external force. These organisations will therefore need change drivers from within their ranks to create some kind of internal disruption towards the improvement of institution and the higher education sector as a whole.

Keywords: microcreditialing, hybrid mode of delivery, disruptive forces, higher education, innovation, resistance to change, student mobility

Introduction

A new epoch for humankind has started in most, if not all sectors of life. Everyone has to adapt to this new era triggered by the ongoing Covid-19 pandemic. One sector that had to adapt drastically is that of education: from primary school level to higher education. The question that seeks to be answered is whether the new period, often referred to as the "new normal", is and will be characterised by less favourable education conditions or not. No one can refute the fact that the Covid-19 pandemic is utterly disruptive. Over a period of two years, it has unsettled millions of individuals, families and communities, not to mention countries and continents. This paper explores a number of external disruptions, some associated with the pandemic, as possible catalysts towards an improved higher education system. Simultaneously, the function and necessity of internal disruption towards sustained innovation is considered.

The value of disruption

In the 19th and 20th centuries higher education institutions had to develop to meet the needs of an emerging "national, analog, industrial economy" (Levine &

Van Pelt, 2021). These authors further contended that "today, higher education is again being transformed - this time to serve the needs of a global, digital, knowledge economy". In both eras the revolution of HE was necessitated by changing societal needs. Christensen (2009), the late Harvard business scholar, pointed out that:

> *US universities mired in an expensive and outdated delivery model, one that prevents huge swaths of our population from taking advantage of the knowledge and expertise harbored by our nation's colleges and universities*.

A decade later, Levine and Van Pelt (2021), referring to the predicted changes in HE, cited Christensen, who argued that the changes will be "of such magnitude that they will disrupt higher education as we know it, rendering traditional models obsolete and driving many colleges and universities to bankruptcy".

Christensen (2009) formulated a number of key characteristics of disruptive innovations, best illustrated by a set of concentric rings. The innermost ring represents established principles, methodologies and structures. Saracco (2022), referring to higher education, called this inner ring the Humboldtian model, characterised by traditional approaches such as full-time residential attendance and relatively inflexible degree programmes, albeit freedom of choice for students. Christensen (2009) estimated that not even 25% of students enrolled in higher education a decade ago "fit the 'traditional' mold of full-time 18 – 22-year-old students. The vast majority has different aims and expectations for their education than that offered by the elites at the center and some of the established rings". Developments away from such traditional model are represented by rings further away from the core, and are primarily practical, as opposed to the rigorously theoretical content of traditional degree courses. Referring to the concentric rings model, Christensen (2009) added that "those left in the center that are unwilling to change their business model" while they continue to increase "quality and costs and serving a smaller and smaller niche of the growing market". This is one of the reasons behind his prediction that institutions that cling to a business model that did not adapt to the modern needs of students, might eventually face bankruptcy.

"Disruptions take root in a new ring either because they are better than nothing or they shift the basis of competition from quality to convenience and customization" (Christensen, 2009). Roquette (n/a) stated that "these disruptive forces are shaping HE and we need a growth mindset to see disruption as a source of innovation".

Disruptive forces that influence higher education institutions can originate internally or externally, but despite the often-hostile nature of disruption, it can lead to much-needed or long-awaited innovation. Management structures in traditional universities will have to prepare themselves to make policy decisions with far-reaching implications on both the way they deliver their courses and programs, and the construction and composition of such programs. Due to new geopolitical trends, the entire higher education sector will experience significant further changes within the next couple of years, some based on changes necessitated by the Covid-19 pandemic.

External disruptions

The Covid-19 pandemic is one forceful external disruption that brought about or accelerated a number of significant changes. Some innovations, such as online

teaching, was already prevalent the beginning of the new millennium shortly after the Internet came into being. Christensen (2009), for instance, pointed out that online enrolments "have skyrocketed in the past decade and, importantly, credentials earned online have made tremendous gains in credibility and are accepted and respected by an ever-growing set of employers". As will be discussed next, new initiatives and approaches act as disruptive forces that higher education institutions have to adapt to, if not the initiator themselves.

Alternative modes of delivery

The first and foremost challenge that the Covid-19 pandemic posed, was the matter of how to reach the students and how to proceed with the courses that they enrolled for. A large number of universities internationally already had online courses in place and was well equipped for online teaching by means of the necessary technology, in the form of both hardware and software. Yet, direct contact with the students in lecture rooms were still the order of the day in the beginning of 2020. The first year of the pandemic was characterised by emergency measures put into place, during which it was left to lecturers to find innovative ways to offer the courses.

The interaction between lecturers and students became more structured in 2021. When it dawned that the Covid-19 pandemic will not subside as rapidly as was expected, more guidance was offered to lecturers on teaching and learning processes. Some lecturers demonstrated well-developed technological capacity, but those with limited experience, skills and inclinations in this regard experienced serious challenges. It soon also became clear a certain portion of students did not have the level of access to computers and the internet to cope with the demands of their studies. Those who managed access through mobile phones, had limited data, and plans had to be devised by universities to assist them. As can be expected, tuition at higher education institutions in first world countries were much less affected (Li & Lalani, 2020), but even in these countries students from lower socio-economic communities experienced similar challenges.

When the new academic year started in January 2022 in South Africa, all primary and secondary schools, as well as the university campuses could open again. The difficult policy decisions currently revolve around students and teachers not being vaccinated to be allowed or refused access to hostels, classrooms and sports facilities. As internationally, strategies to ensure students and staff stay safe from COVID-19 are being considered, which includes testing, social distancing, and de-densification (Kim, 2020). In South Africa thousands of individuals, including staff members and students, regard it as an infringement on their human rights to be vaccinated, or the run the risk of being excluded from certain activities and premises in the absence of a vaccination certificate.

The mode of delivery that has developed internationally – that of a blended program or a hybrid model – is a combination of online tuition and contact sessions, with a varying percentage of each. Referring to the disruptive force associated with the inevitable increase in online teaching, Roquette (n/a) called for "the improvement of the online experience to provide more student engagement included in blended programs that combine online with face-to-face".

Student (im-)mobility as disruptive force

Considering higher education globally, major changes are currently being experienced in the context of the mobility of foreign students between countries, or rather the lack of mobility due to closed borders, quarantine restrictions and vaccination requirements. Roquette (n/a) referred to a "re-balancing of trans-national education". She points out that those countries that traditionally offer their courses in English, up to now imported students from predominantly Asian countries (China, India, Malaysia, South Korea, Singapore and Hong Kong). Higher education institutions in countries such as the USA, UK, Australia and Canada depend to a great extent on fees paid by international students to flourish (or survive) financially. Referring to the Australian context in April 2020, Hurley (2020) predicted that:

> *… the next big hit will come mid-year when $2 billion in annual tuition fees is wiped from the sector as international students are unable to travel to Australia to start their courses for the second semester.*

Early in 2021, Hurley (2021) reported the following, confirming his prediction in the previous year: "In October 2019 almost 51,000 new and returning international students arrived in Australia. In October 2020, this figure had fallen by 99.7% — to just 130".

Turning to the UK, Saracco (2022) asked the question how higher education in Britain should respond to the disruptions caused by new geopolitical dynamics, as mentioned by Roquette (n/a) and confirmed by Hurley (2020) and Hurley (2021). Saracco (2022) asserted that 45% of all students studying abroad in the world hails from countries in the Indo-Pacific region, which is without doubt the main source of international students. One of the solutions she offered is

> *to intensify transnational education (TNE), enabling foreign students to obtain a degree from British universities without leaving their country. This formula has several advantages as countries do not need to develop universities from scratch and can draw on recognised expertise and existing resources.* (Saracco, 2022)

Roquette (n/a), however, warned higher education institutions that offering online courses from countries such as the UK is not the total solution towards attracting international students: "Their traditional student-source countries become competitors. These 'new importers' will take advantage of very high regional HE demands, their own booming economies, increasing English-language-based provision and lower fees".

Microcredentialing

In the context of the Christiansen concentric rings model, microcreditialing (Ascione, 2021), has become a significant disruptive force for traditional universities that should ideally lead to innovative restructuring practices, if leadership in such universities find a way to make such a paradigm shift. The notion of microcreditialing is also referred to as micro certification (Saracco, 2022). Ascione (2021), discussing current trends in the development of higher education institutions, defined microcredentialing as follows: "Microcredentials demonstrate knowledge and competencies, are attainable in shorter periods of time, and tend to be more narrowly-focused". In the context of the ways in which higher education should

react to new geopolitical dynamics, Saracco (2022) promoted a proactive policy on micro-certifications, individual training accounts and apprenticeships.

Levine and Van Pelt (2021) predicted one new reality higher education institutions will have to cope with: a decrease in institutional control and an increase in the power of higher education consumers. Alternative qualification processes and structures will have to be put in place, which will most probably cause tension between adhering to the strict regulations of qualification authorities, and market-driven new requirements according to which university degree is not necessarily what is required (El-Azar, 2022). Roquette (n/a) referred to big companies like IBM, Google and Amazon who do not necessarily require university degrees of new employees: "I see algorithm mentors that will guide learners on their next choice of a course, a module or project/experience. More clarity will also emerge on the skills and competences that people carry with them as virtual badges".

In their exposition of realities that higher education institutions should prepare for, Levine and Van Pelt (2021) described a postsecondary sector that is found over and above traditional colleges and universities:

> *It consists of a hodgepodge of diverse and independent for-profit and non-profit initiatives, organizations, and programs and services beyond mainstream higher education that have abandoned key elements of traditional higher education practice. They are rejecting time- and place-based education, creating low-cost degrees, adopting competency- or outcome-based education, emphasizing digital technologies, focusing on the growing populations underrepresented in traditional higher education, and offering pioneering subject matters and certifications.* (Levine & Van Pelt, 2021)

In the context of the prevailing knowledge economy, Levine and Van Pelt (2021) pointed at the fact that such institutions are rapidly increasing and expanding: "They provide cheaper, faster, more accessible and/or more convenient alternatives to traditional institutions". This should be seen as stern warning to traditional colleges and universities to seriously consider alternative ways of structuring their programs. Once such programs, for example four-year degree courses, have become unattractive because of its inflexibility, enrolments will decline. Those institutions that meet the requirements of the market – both the students as consumers and the labour market for which students have to be prepared – will thrive.

Christiansen (2009) admitted that the quality of education and the prestige of the resulting qualifications attained through these lower-cost courses may be questioned by those that stand by traditional universities as well as qualification authorities. However, he maintains that these qualifications are, "in the eyes of both consumers and employers, frequently good enough". This phenomenon can probably be explained by the fact that most of these qualifications are tailor-made for a specific purpose in a specific industry.

Microcreditialing has several distinct characteristics. In the first place it is individualised education that is competency-based. "Employers increasingly recognize that course credits and degrees have been weak proxies for developed capabilities" (Vander Ark, 2021). In addition, students can proceed through the course at their own time. In the context of microcreditialing, some customs that are historically embedded in the traditional university set-up, such as semester or annual courses – the strict adherence to uniform time constraints – should be abolished in favour of a much more flexible approach.

Internal disruptions

Consistent with the well-established principles of the management of change, for organisations to grow and adapt to new circumstances, organisations need change drivers. Change drivers can be external factors, but when these drivers come from their own ranks, they are members of the organisations who are convinced that certain changes need to be implemented. Sometimes such change agents are in managerial positions, but in many cases they come from the lower ranks of the organisation.

Change drivers rely on formulating reasons for the necessity of change, in order to persuade the rest of the organisation to start implementing such change. In a survey involving 3 199 executives from industries and regions around the world and conducted by the McKinsey Quarterly in 2008 (cited by Dentinger & Derlyn, 2009) the two main reasons for change identified by the respondents are to be more efficient and competitive.

In higher education, the external disruptions identified were alternative modes of delivery, student mobility, and microcreditialing. Within the context of a higher education institution, it can be predicted that all three of these possible innovations will be met with some level of resistance, despite the magnitude of the external force. These organisations will therefore need change drivers to create some kind of internal disruption to enact the necessary changes towards higher competitiveness and increased effectiveness. Once the severity of external disruptions subsides to a certain extent, it cannot be taken for granted that the changes will be established to such an extent that they will be maintained. Universities were forced into alternative modes of delivery which have distinct advantages but may be discarded once they are not essential anymore. Some members of the organisation may argue that the university should return to exclusively the contact mode of delivery that marked the pre-Covid era and abolish any kind of hybrid model. When student mobility returns to the "previous normal", the measures put into place in higher education institutions as coping strategies may be discarded. Movements towards microcreditialing may be terminated shortly after implementation, irrespective of the fact that they bring about significant advantages due to their flexibility and the fact that they ensure highly effective workplace related qualifications.

Conclusion

In this paper it was argued that disruptions from either external or internal sources can play a positive role in the innovation of higher education. Mintz (2021) appealed to those involved in higher education institutions not to try to go back to the "old normal". He pointed at the fact that the "pre-pandemic reality was beset by challenges and inequalities, which the pandemic exposed and intensified". He added that many students need something different than what was offered, and that the existing business model of meaning higher education institutions was precarious.

Enthusiastic and motivated change agents inside higher education institutions will have to initiate internal disruptions for the benefit of the organisation. Emergency measures, developed under the pressure of external disruptions, will have to be entrenched in formal policies to ensure sustainability. In the words of Mintz (2021):

> *Rather than viewing the pandemic wholly negatively, we'd do better to consider it a hard-earned learning experience that has opened our eyes, challenged us and driven us to make long-overdue reforms. We'd be remiss if we failed to learn the pandemic's lessons.*

Saracco (2022) concurred with Mintz: "Even if universities continue their central mission of transmitting knowledge, they will have to diversify the range of training they offer in partnership with large companies".

It is imperative that higher education authorities, in their policy-making processes during the new era that has just started, should use every opportunity to innovate, even if this means that the current business model has to be adapted or abolished. Only such an approach will ensure a positive contribution from higher education to the knowledge economy of a country.

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Strengthening Sustainable Development in Academic Activities: Focus on Teacher Training and Professional Development

Abstract

In alignment with the theme of the conference *Towards the Next Epoch of Education*, this paper brings attention to the need to strengthen focus on sustainable development in academic activities. As evident in scholarly literature, universities worldwide began to embrace Sustainable Development Goals initiated by the United Nations 2030 Agenda. Regardless their commitment, it is evident that many countries, especially developing ones struggle to effectively implement sustainable principles and practices in academia. This qualitative study brings attention to challenges associated with implementation of Education for Sustainable Development as well as suggestions how to promote ESD within teacher training and professional development of educators. The study is grounded in international literature review; however, findings come from the developing world where the authors are located. The results indicate the need to transfer sustainability-related pedagogical knowledge and competencies to educators and prospective teachers. In addition, in order to strengthen sustainable development, higher education institutions need to adapt a holistic approach and implement sustainability principles, knowledge, and practices within all academic activities.

Keywords: education for sustainable development, sustainable development, teacher training, sustainable development goals, professional development

Introduction

Countries globally are facing unprecedented challenges and as a response have committed to the UN 2030 Agenda for Sustainable Development. The 2030 Agenda covers a spectrum of interconnected goals, including poverty eradication, economic progress, social inclusion, and environmental protection. Higher education institutions (HEIs) have shown considerable commitment and progress towards the 2030 Agenda for sustainable development through international dialogue, technology, conferences, teaching and learning, research, strategic planning and signing of declarations (Mula et al., 2017). However, the reality is that HEIs, especially in the developing world grapple with challenges associated with implementing and strengthening sustainable development (SD) in academic activities. Two of the biggest challenges hindering effective implementation and ultimately the attainment of the 17 UN sustainable development goals (SDGs) are a lack of support from top management as well as a lack of financial resources (Rampasso et al., 2020; Avila et al., 2017; Farinha et al., 2020). The effective implementation of education for sustainable development (ESD) has proved to have a positive impact on the sustainability consciousness of students (Novo-Corti et al., 2018). Thus, it is no surprise that scholarly literature has identified ESD as the method with the most potential to change the mentality of citizens, nurture

sustainability-related competencies and achieve the long-term goal of sustainability (Novo-Corti et al., 2018). However, the reality is that in developing countries, including South Africa, ESD is only starting to gain momentum (Solera & Laya, 2017, p. 279). ESD is a type of education that develops knowledge, skills, behaviours and values that enables citizens to take action towards SD and enable students to live and work in a sustainable manner (Lu & Zhang, 2013, p. 49). Meanwhile, UNESCO (2019) conceptualized SD as preparation for the future, where environmental, social, cultural and economic matters are balanced in the attempt to attain an improved quality of life. SD is viewed as a process aimed at achieving the long-term goal of sustainability.

The researchers initiated this qualitative research by conducting a literature review, which facilitated identifying gaps in the body of knowledge on the topic. Subsequently, a document analysis method was employed to address the existing gaps. The following section illustrates main challenges pertaining to implementation of ESD in various academic activities. Then, attention is brought specifically on how to foster sustainability-related competencies in teacher training and classroom practice. The paper concludes with recommendations made for professional development and potential future research.

Challenges with ESD implementation

Based on the reviewed scholarly literature, it is evident that the strengthening of SD in academic activities, through the implementation of ESD comes with challenges. The successful implementation of ESD will depend on the extent to which the challenges towards ESD are identified and addressed by educational leaders, academics and educators. Each of the analysed documents revealed different yet pressing challenges HEIs face when implementing ESD. In addition to the challenges, scholars provided recommendations for management and academics to consider when addressing challenges towards the implementation of ESD. The following text presents collective 10 challenges identified along with recommendations.

The first challenge is the lack of holistic vision and integrated approaches towards innovation and sustainability (Avila et al., 2017, p. 1270). UNESCO recommended the use of a whole-institution approach which includes declaring ESD a priority within policy, providing training to staff, promoting sustainability-related research and collaborative work between stakeholders, faculties and institutions (Farinha et al., 2020, p. 466).

Absence of a holistic vision leads to the second challenge, namely, poor trans-disciplinary co-operation within HEIs, which leaves academics to work in isolation within their faculties and areas of specialization (Avila et al., 2017, p. 1271). Consequently, most initiatives involve campus environmental sustainability (saving electricity) instead of ESD (Takala & Korhonen-Yrjanheikki, 2019, p. 173).

The third and arguably the biggest challenge hindering the effective implementation of ESD is the lack of support towards sustainable initiatives from senior management of HEIs (Rampasso et al., 2020). Reporting about Portugal, Farinha et al. (2020, p. 472) stated that top management within HEIs lack communication about sustainability related strategies, opportunities and actions. Consequently, most sustainable innovations are limited to the campus of HEIs

(Avila et al., 2017). To that end, Mula et al. (2017, p. 805) noted that sustainability-related initiatives in HEIs often rely on the attention and conviction of individual academics. Lu and Zhang (2013, p. 53) noted that when there is a lack of support from top management in HEIs, ESD is viewed as an optional addition into the curriculum and at times is implemented spontaneously by informed academic staff (Avila et al., 2017, p. 1270).

The fourth challenge is grounded in the limited amount of multidisciplinary working groups, committees and offices allocated towards sustainability in HEIs which stems from a lack of guidance and support from top management (Avila et al., 2017, p. 1271; Farinha et al., 2020, p. 466). Having an individual (sustainability co-ordinator) and an office space to addresses concerns about sustainability provides decision making power, hierarchical leadership and guidance (Avila et al., 2017). The lack of office space, sustainability co-ordinators and committees gives rise to the fifth challenge of poor record keeping, reporting, assessing and accountability, which make it difficult for HEIs to track their in-house successes and shortcomings (Farinha et al., 2020, p. 481).

The lack of sustainability-related leadership from top management in HEIs leads also to the sixth challenge, specifically, poor implementation of sustainability-related commitments and policies (Farinha et al., 2020, p. 486). Sustainability related policy and declarations are important towards the goal of ESD. However, Farinha et al. (2020) pointed out that although the signing of declarations and charters is an important driver for SD, it does not always lead to the implementation of their commitments.

The poor implementation of ESD related policies may negatively impact the curricula and research outputs of HEIs, which is the seventh challenge. As evident, HEIs curriculum does not fully include and in some cases, totally disregards information about sustainability (Avila et al., 2017). It is critical for HEIs to include sustainability-related skills, knowledge, attitudes and values into their curriculums and research (Farinha et al., 2020, p. 467). In addition, ESD should not be taught once off, but should receive adequate attention by being taught throughout the curriculum (Tierney et al., 2016, p. 508).

The eighth challenge is grounded in the nature of research into sustainability, which tends to utilize similar methods of data collection and analysis, preventing ground-breaking innovation towards SD (Avila et al., 2017). Farinha et al. (2020) recommended that HEIs advance sustainability-related research by including sustainability goals within their strategic planning as this has proven to generate better research, academic compliance and improved performance.

The ninth challenge is that academics and educators who contribute to ESD by infusing their research and teaching with innovative methods are not being commended for their efforts. Instead of being rewarded for sustainable initiatives they receive extra workloads and are expected to complete SD tasks in addition to their normal duties (Avila et al., 2017). Farinha et al. (2020, p. 490) reported that a lack of incentives is the main factor contributing to poor support from students and local collaboration for sustainability-related events and projects.

The last challenge refers to lack of financial resources (Avila et al., 2017; Farinha et al., 2020). Due to that fact, sustainable initiatives are developed with low funds and almost full reliance on the work of volunteers (Avila et al., 2017).

Implementation of ESD in teacher training and classroom practice

Developing countries such as South Africa are vulnerable to social, economic and environmental challenges which makes strengthening SD in academic activities such as teacher training programs essential (Kieu et al., 2016). Several steps have been taken towards the implementation of ESD in HEIs; however, the complexity of this task calls for a professional guidance and competency development for staff nurturing prospective teachers (Mula et al., 2017). Thomas (2020, p. 896) pointed out that it is essential for educators to infuse their teaching with ESD. However, educators do not always have the ability to include ESD into their teaching and other academic activities for two reasons. First, educators in their own training are often not exposed to SD principles and practices (Mula et al., 2017; Thomas, 2020). Second, employed educators do not receive sustainability-related training in the form of professional development. Consequently, the sustainability-related competencies of educators and prospective teachers are deficient which may negatively impact their capacity to lead towards ESD (Mula et al., 2017). This is problematic since graduates take up leadership positions in society without fully understanding their responsibilities and opportunities for action towards SD. As a result, their cultural assumptions and professional practices perpetuate the exploitation of people and the planet (Mula et al., 2017, p. 799).

According to Lu and Zhang (2013), not enough attention is being paid to the development of students' sustainability-related competencies in HEIs for three reasons. First, the main focus in HEIs has been on research excellence not sustainability principles (Mula et al., 2017, p. 804). Second, both educators and students are not accustomed to transformative teaching methods and feel comfortable with traditional approaches (Lu & Zhang, 2013; Thomas, 2020). Third, educators are not always comfortable with relinquishing their positions of power in the classroom to facilitate student-centred learning.

Brandt et al. (2019) urged HEIs to prioritize sustainability-related teacher training programs as the successful implementation of ESD is greatly dependant on the commitment and competencies of educators within the institution. The focus of ESD is on the transformation of pedagogical approaches and competencies as traditional pedagogical practices are not adequate to address the complexity of SD (Thomas, 2020). Zooming on pedagogical change, Mula et al. (2017) recommended that it occurs at three levels. The first level is within the classroom where new, transformative classroom practices should be implemented. The second level is grounded in the curriculum of teacher training programs, which should be redesigned. To that end, Thomas (2020, p. 896) advised educators to embrace and be a part of the change by taking responsibility in becoming the architects of the curriculum, instead of the distributors of the curriculum developed by others. The third level referred to the strategic planning of educational leaders, who should ensure that educational priorities of HEIs at all levels are geared towards sustainability (Mula et al., 2017).

Thomas (2020) made three recommendations that educators can consider when nurturing sustainability-related competencies. First, the author argued that classroom learning about sustainability is essential to develop ethics and a sense of responsibility amongst students. Second, learning cannot be limited to the classroom. In fact, outdoor learning experiences are as valuable and necessary to be

interlinked with methods to improve environmental, social and economic conditions of society. It is however important to note that the curriculum within education systems may not prioritize opportunities for learning to occur outdoors, thus educators should create opportunities for outdoor learning (Thomas, 2020). Outdoor learning creates a link between the classroom and the local environment in a multi-disciplinary manner. In short, exposing students to the outdoors increases the potential of HEIs to nurture sustainability-literate graduates (Thomas, 2020). Third, Thomas (2020) recommended that educators strive to develop a comparative perspective when teaching towards ESD. Exposing students to local and global environments promotes better understanding of their local environment and the role they play in the global ecosystem (Thomas, 2020).

Implementation of ESD in professional development courses

Brandt et al. (2019) pointed out that strengthening SD in academic activities should be prioritized (through policy and practice) not only in teacher training programs, but also during employment, in the form of professional development. Effective professional development entails equipping educators with the ability to not only include sustainable elements into the existing system, but also to influence sustainability-related changes within the institution (Mula et al., 2017).

It is also important to note that professional development is time consuming and calls for resources. Mula et al. (2017) are of the belief that staff development should be continuous and promote sustainable thinking along with competencies that can catalyse change within the classroom and the institution. The abovementioned can be achieved by providing opportunities for mentoring, collaborating, and sharing pedagogical inquiry. It is essential for teacher training programs and professional development programs to train educators to incorporate transformative learning methods into their teaching (Mula et al., 2017). Lu and Zhang (2013) noted that learning can be described as transformative when it occurs holistically, explores multiple realities and their interconnections, enables critical thinking and actively involves students in the learning process. Similarly, transformative learning can occur by creating opportunities to learn from real-life environments with real-world problems (Brandt et al., 2019, p. 632), which should initially be grounded in the local environment of educators and subsequently be expanded to the global environment (Thomas, 2020).

The key towards sustainability: classroom practices

Professional development courses should also address a concern expressed by Jodoin (2020) that teaching approaches with the potential to develop sustainability-related competencies are not being utilized in the classroom because it conflicts with traditional teaching approaches. Active learning, participatory learning and interdisciplinary thinking are competencies that educators should strive to develop within themselves and their students. Furthermore, Brodowski (2017) recommended that educators be trained to utilize two methods to nurture the abovementioned sustainability-related competencies within their classrooms. First, student-centred approaches should be utilized within each lesson infused with real life, sustainability-related critical thinking and problem solving. Second, it is imperative

for educators to possess knowledge about sustainability and have the capacity to transfer sustainability-related knowledge in a meaningful way.

Conclusion

As evident in the reviewed literature, HEIs can respond to existing challenges by giving the precedence to nurturing sustainability-oriented citizens. Developing sustainability-related competencies of educators, educational leaders and students through professional development and teacher training courses holds high potential to (a) strengthen SD in academic activities and (b) effectively respond to current challenges.

HEIs should be proactive in implementing ESD and taking a lead role in contributing to SD thus realization of the SDGs. The institutions need to embrace their changing roles and their unique position to nurture sustainability literate graduates. HEIs also have a responsibility to ensure that the needs of the present and future are well understood by future leaders and professionals. This responsibility is delegated to HEIs because they are tasked with educating professionals who will take up leadership positions within society and ideally who will have the potential to incorporate sustainability into their organisations' operations (Novo-Corti et al., 2018, p. 820). In addition, the commitment of HEIs towards sustainability is expected to serve as an example to other citizens and institutions (Novo-Corti et al., 2018, p. 821). There is a consensus that in developing countries considerable progress is being made to strengthen SD in academic activities, however, for improved implementation, ESD needs to be better incorporated into the curricula and teaching practices. An obvious starting point would be to equip educators and prospective teachers with training on sustainability-related pedagogical knowledge and competencies. The strengthening of SD in academic activities will also require a holistic approach meaning that sustainability principles, knowledge, and actions are present in all academic activities and practices. Support from HEI leaders to accomplish these goals is imperative.

In terms of future research, academics could investigate ESD at their own institutions to identify the status and areas that require improvement. HEIs and other educational institutions could also be examined, through a comparative method, to identify and share best practices to strengthen SD in academic activities.

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Statutes and Case Law as Sources for Discourse Analysis When Researching South African Education Reform through a Complexity Theory Lens

Abstract

This paper explicates how statutes and case law (court cases) can be used as sources for discourse analysis when researching South African education reform through a complexity theory lens. Firstly, the law-making process is built on discourses at different levels. Secondly, discourses are manifested in case law because in order to resolve disputes arguments are presented on which the court is then required to rule. Discourse analysis explores how meaning, identities, activities and relationships are negotiated and constructed and these sources of discourse are useful when the focus is on the study of actions and interactions within the education system.

Keywords: discourse analysis, complexity theory, education reform, law as discourse, case law as discourse

Introduction

Discourse analysis explores the meaning participants and actors make in social interactions and settings (Lee & Adler, 2006, p. 42). Fairclough (2005, p. 925) describes a discourse as a certain way of representing physical, social, psychological aspects of the world. For example, political discourses may be liberal, conservative, social-democratic, and so forth. Thus, the relationships between social groups in a society are manifested in different ways through these discourses (Fairclough, 2005, p. 925). Hajer (2005, p. 300) defines discourse as an "ensemble of ideas, concepts, and categories through which meaning is given to social and physical phenomena, and which is produced and reproduced through an identifiable set of practices". Hajer (2005, p. 300), however, points out that discourse is not the same as discussion, but that it denotes "a set of concepts that structure the contributions of participants to a discussion". According to Cohen, Manion and Morrison (2011, p. 574), 'discourse' is used in research to reveal the meanings that are given to texts. In turn, these meanings create and shape knowledge and behaviour by among other, the exercise of power through texts and conversations.

The underlying philosophy of discourse analysis is that "knowledge and meaning is produced through interaction with multiple discourses" (Starks & Trinidad, 2007, p. 1372). Discourse analysis therefore explores how meaning, identities, activities and relationships are negotiated and constructed (Starks & Trinidad, 2007, p. 1374) and "reveals how power operates and is legitimated or challenged in and through discourses" (Cohen, Manion & Morrison, 2011, p. 574). In discourse analysis, "the analyst is also attuned to how context constrains and enables" (Vincent, 2017).

Statutes (acts) as discourse

The law presupposes a society and a need for some structure of authority or government that will make rules for the whole society (Kleyn & Viljoen, 2010, p. 1) in order to regulate the behaviour of its subjects, hence the rulers who lay down the legal rules. Justification for these rules and authority can be found in the idea of a social contract into which people have entered (Kleyn & Viljoen, 2010, p. 1). This social contract is an agreement between the ruler(s) and the people. According to Kleyn and Viljoen (2010, p. 1), "each person gives up his or her unlimited freedom in order to make peaceful co-existence possible". Thus, it is self-imposed and binding (Rosenfield, 1995, p. 1170) because people submit themselves to the authority of the state. It being an agreement, the notion of a social contract is binding to both the people and the state. The laws (rules) are interpreted and applied by institutions or organs of state and if necessary, enforced by employers of the state, for example the police. This means that some form of sanction will follow upon non-compliance with a law (Kleyn & Viljoen, 2010, p. 2). However, as indicated by Kleyn and Viljoen (2010, p. 3), "law should be more than just a series of decrees and rules enforced by a brutal display of state power". Any legal system is grounded in a value system which is important to society and acts as a unifying force.

Notwithstanding the above, it is argued by Rosenfield (1995, p. 1170) that "even if all legal actors could influence democratic law making, the resultant laws are unlikely to be in equal interests of all those affected". Despite being democratically enacted, laws may be oppressive and their enforcement may disadvantage disfavoured legislative minorities. Drawing on Habermas, Rosenfield (1995, p. 1173) explains that "the appeal of a particular paradigm of law … depends on its ability to reconcile legal and factual equality while bridging the gap that splits system and lifeworld in a way that secures and constrains systems and that concurrently supplements the output of the lifeworld".

A current example of law as discourse can be found in the process of promulgating the draft Basic Education Laws Amendment Bill (2017) as law. Mqeke (2008, p. 201) explains that a bill reaches Parliament through two distinct routes, through recommendation of the South African Law Commission or through the Ministerial route – the so-called task team approach. The Law Commission works through project committees who are persons deemed experts in the relevant sphere of law under consideration and are often university professors and other academics recognised as experts in the field (Mqeke, 2008, p. 201). However, the majority of statutes originate through the Ministerial route (Mqeke, 2008, p. 201) as is the case with the draft Basic Education Laws Amendment Bill (RSA, 2017).

The law-making process, from initiation to the eventual acceptance of a law, is built on discourses at different levels and a number of elements can be identified. Firstly, legislation (statutes or acts) initiated by the government. By introducing a bill, the government not only signals its intention to create a new statute or to amend existing legislation, but also signals stance on particular issues – its ideological ambitions (Doherty, 2007, p. 195). In other words, the government interprets the context as it sees it and proposes a response – the context aspect of complexity theory. Secondly, the law-making process allows for public comment and the Constitution of the Republic of South Africa envisages that there should be on-going

interaction between citizens and their elected representatives in Parliament who are the legislators (February, 2006, p. 135). In the South African education landscape, this not only allows role players and stakeholders such as teacher unions, governing body associations and other non-governmental organisations to give input, but also individual schools and individual members of the public. In addition, not only have the internal procedural workings of parliament built into it a number of occasions in which public input can be made (February, 2006, p. 135), Parliament also has a constitutional duty to facilitate public involvement in the legislative process. These two elements relate to the interaction, feedback and connectivity elements of complexity theory.

Thirdly, once a bill has become a law, it becomes part of the social contract between the rulers and the people, altering the legal environment. This relates to the emergence aspect and the context aspect of complexity theory. A new law has emerged, and because the new law has altered the legal landscape, the context has changed. This new context influences the framework in which policy makers and policy implementers must operate. It not only represents the ideological ambitions of the government (the rulers), but speaks to the institutional context, components and the identity of the institutional context (Doherty, 2007, p. 195). In addition, one has to keep in mind that the legislative branch of government makes the law (statues) and that this law only provides broad directives. It is the executive branch which needs to add flesh to the law by providing details in the form of regulations (Russo, 2006, p. 9), thereby adding to the discourse.

Fourthly, the connectedness-aspect of complexity theory comes to the fore in the inter-connectedness of statutes themselves. This interconnectedness with other statutes also forms part of the context(s) of the law and contributes to the non-linearity, one of the aspects of complexity theory.

Case law as discourse

Discourses are manifested in case law because, especially in civil proceedings, when an aggrieved party resorts to litigation in order to resolve a dispute with another party, arguments are presented and the court is then required to make a ruling by considering the facts, the law and previous court judgments. Often these rulings require specific actions. Thus, from a complexity theory perspective, we have the interaction aspect, in that by resorting to litigation, disputing parties interact with each other and the law. This interaction implies that they are inter-connected in some form or manner. The feedback and emergence aspects of complexity theory are found in the judgment by the court, the subsequent prescribed actions and judicial precedents. The aspect of context is present in that a court judgment is based on a specific dispute which has taken place within a specific setting which disputing parties interpret differently. Although the courts are primarily concerned with the interpretation and application of law – the feedback aspect of complexity theory – courts also create law (Joubert & Prinsloo, 2008, p. 1) – the emergence aspect of complexity theory. Therefore, a basic understanding of the role and function of private law, civil law procedure and the doctrine of judicial precedents is necessary in order to clarify case law as discourse.

One firstly has to distinguish between positive law and law in the subjective sense. This distinction is explained by Kleyn and Viljoen (2010, p. 108) as follows:

positive law – law in the objective sense – is the whole body of legal rules that applies as a system in South Africa and regulates the relationships on a horizontal level between persons by means of the rules of private law. Because all persons have their own particular interests, the potential for conflict and disputes is good and it is the purpose and task of private law to harmonise the relationship between persons in such a way that society will be orderly and peaceful (Kleyn & Viljoen, 210, p. 107). The law in the subjective sense refers to the way in which private law regulates the relationship between persons (the interaction- and interconnected-aspects of complexity theory) by means of the concept of subjective rights (Kleyn & Viljoen, 2010, p. 108).

Thus, private law concerns the relationship between persons and persons are therefore the subjects of private law who are allowed through private law to have subjective rights and duties with respect to each other and with respect to certain objects (Kleyn & Viljoen, 2010, p. 108). Robinson et al. (2008, p. 6) define a legal subject as a carrier of legal competencies, subjective rights and in the South African law, all persons are legal subjects. The term 'person' does not only imply a human being and the term 'legal subject' must be defined widely enough to include both human beings and juristic persons (Kleyn & Viljoen, 2010, p. 108). There are thus two kinds of legal subjects, namely human beings, referred to as natural persons, and juristic persons who are groups of persons or associations of people such as a company, a university, a church or a school (Joubert & Prinsloo, 2008, p. 7; Robinson et al., 2008, p. 7). Positive law recognises that associations as such, or in itself, are legal subjects which means that a juristic person is an artificial or abstract person (Kleyn & Viljoen, 2010, pp. 108-109). A juristic person participates through its organs (agents) (Kleyn & Viljoen, 2010, p. 109). For example, a school governing body would participate in legal proceedings on behalf of the school (Joubert & Prinsloo, 2008, p. 7).

The law of civil procedure allows for two forms of civil procedures when approaching a court action proceedings and application proceedings (Kleyn & Viljoen, 2010, pp. 117-118). Although different in procedure, both these proceedings allow for the plaintiff/applicant and defendant/respondent to present arguments, albeit in different forms. It is these interactions that are significant to discourse analysis as the ruling of the court also may become a judicial precedent (case law).

Joubert and Prinsloo (2008, p. 21) provide the following examples of how courts create law and why case law is important:

- The courts determine how governing bodies must perform their functions and what the limitations of their powers are.
- Courts have the power to review the administrative actions of the Department of Basic Education.
- Courts interpret statutory and common law principles that are often vague, broad and general.

Case law or judicial precedent is previous rulings handed down by various courts in specific cases (Joubert & Prinsloo, 2008, p. 21). This means that lower courts are bound by the decisions of higher courts and that a court is also bound by its previous decisions, unless they are wrong (Kleyn & Viljoen, 2010, p. 59). However, the higher courts are not bound to the decisions of lower courts. There is

therefore a hierarchy of courts which dictates the manner in which the doctrine of judicial precedent is applied (Kleyn & Viljoen, 2010, p. 60).

From a discourse analysis perspective, arguments presented by the actors (applicants and respondents) and the interpretation of these arguments by the courts, provide valuable insight into the meaning the actors make in these interactions and settings. From a paradigm of complexity theory perspective, a number of aspects can be identified. There is, for example, interaction between the candidates for the principal position, the school governing body, the provincial Head of Department, the law and policy relating to the appointment of principals to public schools and the applicable courts. This interaction illustrates the interconnectedness of these actors in the system. The court judgments not only correspond to the feedback aspect of complexity theory, but also speak to the emergence aspect of complexity theory in that the law has been expanded through judicial precedent, directing future actions such as policy design and implementation. Judicial precedent also contains a contextual aspect in that it is only applicable to similar situations. There is thus interconnectivity between actors, the law and past and future actions.

Conclusion

As the underlying philosophy of discourse analysis is that "knowledge and meaning is produced through interaction with multiple discourses" (Starks & Trinidad, 2007, p. 1372), statutes (laws) and case law and policies become important sources of discourse when researching education reform. In addition, these two sources of discourse are particularly compatible when education systems are studied from a complexity theory perspective.

The main attraction for using statutes (laws) and case law in discourse analysis lies in its emic nature as it allows for the subjective meanings placed on situations to be captured (Cohen, Manion & Morrison, 2011, p. 222). Hence, it permits for a 'culture' to be studied or described in terms of their internal elements and their functioning. It allows researchers to engage in an analysis and critique of the different discourses as both 'instruments of power' and 'effects of power' (Cohen, Manion & Morrison, 2011, p. 589). In other words, how does power operate and what are its effects. These sources of discourse are thus useful when the focus is on the study of actions and interactions within the education system.

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Exploring Inequality in South African Higher Education Institutions (HEIs) through Vignettes

Abstract

Vignettes, as a research method, presents short hypothetical stories to individuals to elicit their views on a particular topic. A review of the literature indicates that although vignettes have successfully gleaned detailed data on phenomena, few research studies have employed this valuable method in higher education institutions' (HEIs) contexts globally. This paper provides findings from a qualitative study that generated data through vignettes to understand students' perceptions of (dis)advantage. Twenty-four honours students from five faculties at one HEI in South Africa participated in the study. Findings indicate that vignettes more effectively glean rich qualitative data on sensitive or complex topics than other research methods. The method can prompt open discussions on topics usually regarded as sensitive by the participants because it helps them to reflect on their own lived experiences of (dis)advantage in HEIs. More importantly, this study shows that vignettes reveal the hidden and unexpected of what constitutes (dis)advantage, for example, low-income students have certain advantages that contributed to their success. This finding has direct implications for the design of interventions at HEIs aimed at reducing inequality.

Keywords: vignettes, research method, higher education, inequality and disadvantage, South Africa

Introduction

Higher education institutions (HEIs) use various research methods to investigate pressing issues such as inclusivity and inequality in diverse contexts. The use of vignettes to generate rich data is one of these methods. The vignettes take the form of short hypothetical or fictional stories dealing with a particular phenomenon (O'Dell et al., 2012). Vignettes are widely used in qualitative research in various fields including public health, social sciences, and anthropology (Sampson & Johannessen, 2020). However, few studies have used vignettes to do research in higher education globally (Stravakou & Lozgka, 2018). In order to contribute to the existing gap in the literature on this topic, this paper explores the use of vignettes method to investigate the inequality of students in accessing, participating, and succeeding in higher education. The paper is organised in four sections. The following section presents a brief background of inequality in South African higher education then an evaluation of literature on the use of vignettes globally follows. Afterwards, a section on how vignettes were constructed and applied for this research is presented. The paper concludes by a presentation of findings and a discussion.

Inequality of access to and success in South African higher education

South Africa is still grappling with inequality in higher education. The Department of Education (1997) have implemented policies to promote inclusive higher education by increasing the enrollment of historically excluded groups and offering financial and academic support. As evident through the violence and looting in July 2021 in KwaZulu-Natal and Gauteng Provinces and the #FeesMustFall activism in 2015, inequality and poverty in South African society and higher education persist. In 2018, enrolment rates at HEIs were: Black African students (19%), Coloured students (15%), Indian students (46%), and White students (55%). As reported by the Council on Higher Education (2020), based on 2018 statistics Black African students had the lowest success rate (75%), Coloured students (79%), Indian students (80%) and White students (86%). These statistics suggest that the interventions implemented to address inequality have not achieved what policy intended to do.

A review of the literature, however, shows that regardless of policy using the above racial categories in planning and monitoring of its interventions, inequality has become class rather than race based (Spaull, 2019). Furthermore, disadvantage is manifested in a complex intersection of factors ranging from poor schooling to inadequate finances for university expenses such as tuition, transport, accommodation and living expenses in addition to being underprepared for university education (Gore & Walker, 2020; Ruswa & Gore, 2021). Although the disadvantages students face in HEIs have been well documented, the advantages low-income students enjoy have not been given the same level of attention. The few studies that have been done point to limited advantages of low-income students. For example, the socio-economic hardships they have had to overcome which have made them resilient is mentioned as a valuable outcome (Marshal & Case, 2010; Mkwananzi & Wilson-Strydom, 2018). Failure to acknowledge the advantages that students have leads to a tendency to view them through a deficit lens and to focus on their limitations. This is problematic in that it reproduces inequality as policymakers, HEIs management and university teachers often view disadvantage as a norm resulting in inadequate attention on addressing disadvantage (Mathebula, 2019; Smit, 2012).

The study reported in this paper aimed to investigate the meaning of "historically disadvantaged" a term employed by South African higher education policy for interventions meant to address inequality (Department of Education, 1997). Regardless of disadvantage being frequently used, the term has not been defined in policy documents resulting in some HEIs lacking clarity on what it is exactly and the consequent ineffective interventions (Gore & Walker, 2020). The research questions addressed in this paper are:

- What are students' perceptions of their (dis)advantage in accessing and succeeding in higher education institutions?
- How are vignettes useful in exploring advantage among the low-income students?

Learning from the advantages that the low-income groups have is a significant way of informing policy and practice in HEIs to effectively addresses inequality (Mathebula, 2019).

Using vignettes in higher education enquiry

A review of literature shows that there are some studies that have employed vignettes in education. For instance, vignettes have been used to investigate equality in education in the US (Campbell, 1996), students' educational experiences in English and German universities (Kandemir & Budd, 2018), and school principals' values in Greek schools (Stravakou & Lozgka, 2018). The common characteristics of vignettes from the above mentioned studies is that the method focus on a certain research problem and simplify the issues being studied. Furthermore, vignettes explore actions presented in the stories, shed light on people's judgements on an issue, and elicit perceptions that are less personal on sensitive topics (Campbell, 1996). The story in the vignettes demonstrates the behaviour of a particular character or presents a situation within a context making it possible for the researcher to assess the participants' comments on the issues presented in the vignettes (Kandemir & Budd, 2018). When the stories "represent real" life situations, vignettes can generate detailed and honest accounts of a phenomenon as the researcher gains the trust of the participants so that they view him/her as part of the group (Sampson & Johannessen, 2020, p. 58).

After presenting the short stories, participants are asked to describe how they reacted to a given scenario. The fact that the vignettes provide some distance from reality gives the students the confidence to share their own experience and freely express their opinions (Stravakou & Lozgka, 2018). First benefit of using vignettes is that they encourage openness and minimise socially correct responses. Second benefit is that vignettes can generate data on research topics that the participants find sensitive because the method offers participants the opportunity to decide whether to disclose personal information or simply to comment on the stories (Sampson & Johannessen, 2020). Another benefit of using the vignettes is that they offer researchers the flexibility to focus on different aspects of the problem under study (O'Dell et al., 2012). The method also makes it possible to generate not only normative perceptions, but also stigmatised or deviant perceptions (Campbell, 1996). In some cases, however, vignettes can generate erroneous data because the participants' experiences might not resonate with the experience depicted in the vignette (Kandemir & Budd, 2018). The method can also encourage participants to give responses that are socially accepted (Stravakou & Lozgka, 2018). Despite its detractions, this method offers strong benefits and deserves to be employed in higher education in South African.

Research methodology

A qualitative methodology was adopted for the study using vignettes to gather data regarding students' views on the meaning of (dis)advantage in HEIs. Twenty-four volunteers were recruited at one South African HEI using a convenience sampling technique. Participants were drawn from five departments in the five university's faculties. The participants were diverse with regard to their socio-economic status, race, gender and schooling backgrounds. Vignettes, in the form of short stories, were developed based on literature from South African higher education depicting students' varying opportunities to access and succeed in HEIs. Campbell (1996) outlines three essential criteria that should be met when developing

the short stories, namely: a research problem, plausibility and pertinence. The criteria were all met when the short stories that presented scenarios of (dis)advantage were developed.

The data generation process involved requesting each of the participants to read three short stories. This was followed by individual interviews with open-ended questions exploring to what extent, and how students depicted in the short stories were (dis)advantaged. The interviews were audio-recorded and then transcribed before being thematically analysed with the help of NVivo 12, a qualitative software. The analysis process involved identifying text with similar meaning before combining the text to form subthemes. The subthemes were subsequently merged into themes (presented in the findings sections).

Findings

Vignettes can elicit detailed responses to the interview questions, encourage participants to reveal sensitive information, and offer flexible platforms to make judgements on complex topics. The following sections represent the final themes.

Vignettes stimulates detailed responses to the interview questions

Based on the findings, it was evident that vignettes prompted participants to discuss disadvantage in detail. Participants went beyond identifying the different forms of disadvantage to providing possible coping mechanisms without the researcher prompting them to do so. One of the participants stated that:

> *I felt like **Lerato** [female, black and low income] is disadvantaged, firstly she lives off campus and can't afford to go to campus every day. She lives in a neighbourhood that is noisy, she doesn't have the type of friends that she needs to study with. I feel like that's what is happening with most of the students. I would, however, tell her to not drop out of school and study full time. Even though it's very difficult, you learn to find the balance, like for her, when they pass out at one in the morning, you learn to study at night, you have to adapt or die. She has to find a way because she is very disadvantaged because even if she drops out of school and finds a full-time job she is still going to be in the same environment.* (**Lebo**, female, low-income, black, Honours in Political sciences)

Besides the stimulation the vignettes offered, the detailed responses given by the participants could derive from the presented scenarios related to the students' own lives and experiences. Aspects that emerged from the data were: accommodation that was not conducive to study, lack of funding for travel to and from the campus, lack of social networks for academic support, failure to adjust to university environment, and thoughts about dropping out from the university.

Vignettes encourage participants to open up when discussing sensitive information

The findings indicate that the vignettes encouraged participants to openly discuss issues. Participants might not have been comfortable to open up if other research methods had been used. One example is race, a sensitive topic in the South African context. Participants gave uncensored responses with regard to race and disadvantage. Concerning the persistence of disadvantage among the black students, one participant noted:

> *In the ways that **Lerato** cannot come to university, I don't think that it is a white man's fault [and apartheid] of her being disadvantaged because its 20 years since 1994. Since then the government could have built even a railway station, if it was like that. From the townships, poor people could come and study, and I don't think it's a white man's fault. **Lerato** situation could be a white person as well and I could also say she is disadvantaged. The government could have done something to improve the situation. I hope I'm right and I'm not wrong but that's what I feel [laughs].* (**Henrick**, white, male, middleclass, Honours in Agricultural Economics)

Blame for the limited progress made in redressing disadvantage is laid at the door of the ineffective policies and corruption of post-apartheid administrations. The vignettes thus encouraged the participants to comment freely on sensitive issues.

Vignettes offer flexible platforms to make judgements on complex topics

It seems clear that vignettes have the potential to untangle the complexity of inequality and also allow participants to provide insights into the different ways and the extent to which students are advantaged. The different scenarios presented in the vignettes prompted participants to provide reflective comments on their experiences which enabled them to reveal the unexpected. For example, one participant mentioned that:

> *I feel like I am advantaged, not in a sense that I have money. I feel like I am advantaged in the sense that the first years of my life, […], people (relatives) took a liking in me and contributed to paying for my studies and paid for my schooling. […] I eventually enrolled at this university even though I failed to come here for the first six months (due to lack of finances) before I got a bursary. […] I appreciate my studies even more, I feel like it drives me and turned me into this person that I am a wonderful hardworking person. Sorry, I am getting a bit emotional […sobs].* (**Palesa**, black, female, low income, Honours in Education)

After reading the vignettes, the participant related her lived experiences, revealing that she perceived herself as advantaged because the financial challenges she had faced had made her determined to work hard. This account demonstrates that advantage may be described as having a positive view about one's life and being motivated to work hard to improve one's life. Even the mere fact of having a bursary, despite its inadequacy of the amount of money offered, is construed as an advantage by low-income students.

Having aspirations and goals for one's education and future career as well as being able to work to achieve them was interpreted by the students as an advantage. All the participants indicated that they looked forward to secure well-paying jobs after graduating including teaching, being in business, farming, marketing and accounting. **Rufuno** provided the following account:

> *Firstly, I want to be a psychologist, I want to help people. I want to make money that satisfies me internally. […]. The association that I am part of (charity organisation), we are already doing things that are I want to do in future. We are helping people, we are touching people's lives with our services. We get to go out in the community and help people, so I feel that right now I am in the right path.* (**Rufuno**, black, female, low income, Honours in Psychology)

The extract shows that having aspirations such as graduating, securing a paying job, taking care of families and being concerned about local communities were interpreted by these students as an advantage. Resilience also emerged as identified

advantage by some low-income students. Most of the low-income students indicated that they had failed and repeated some modules in their first and second years as they had struggled to cope with university education. Despite the difficulties they encountered, the students were able to bounce back and graduate, which provides evidence of their resilience. Vignettes, therefore generated data that called in question the widely held perception that low-income students are solely disadvantaged. The vignettes unpacked some advantages the low-income students perceive having including: being committed to hard work, being motivated, being resilient, having high aspirations, having a bursary, and caring for other members of their family and communities.

Discussion

The findings indicate that vignettes are an effective method of data generation as they encourage participants to elaborate on how the scenarios presented relate to their own lives. Sampson and Johannessen (2020) contend that vignettes stimulate open engagement especially on sensitive topics because they are impersonal. Furthermore, findings illustrated that the method generated rich and unexpected responses. The finding is contrary to the assertion by Stravakou and Lozgka (2018) that the vignettes generate socially correct responses. While low-income students were disadvantaged in several ways because of their limited resources, the vignettes revealed that these students perceived working hard, thinking positively about their lives, being motivated to change their lives, and having a bursary even when it offered inadequate funding, as advantage. Mkwananzi and Wilson-Strydom (2018) explain that low-income students can set and attain high goals if they perceive aspirations as achievable and when the socio-economic conditions permit. More so, the results of this study demonstrated that being resilient is an advantage. The finding corresponds with Gore's (2020) study that showed that some low-income students can rebound after failing some modules contributing the students graduating (Gore, 2020). Equally interesting is the finding that caring about their families and being concerned about the welfare of their communities was considered as an advantage. This resonates with the aim of South African higher education to produce graduates who are not only employable, but also have good citizenship values (Department of Education, 1997). Thus, the vignettes allowed us to move from viewing students as having shortcomings to recognising the advantages that students from low-income groups perceive having that can enable them to be successful (Mathebula, 2019; Marshal & Case, 2010).

Conclusion

As evident from this study, vignettes are a valuable method that can be effectively employed to generate data for equality and inclusive higher education. Furthermore, this research confirms the value of bolstering vignettes with semi-structured interviews, to validate the data and reduce the possibility of generating erroneous data. The findings revealed the centrality of motivation, hard work and high aspirations to students from low-income communities who are driven by the lived experience of hardship. To that end, an obvious recommendation for HEIs would be to consider making full use of these forms of identified advantage by

offering peer social support programmes and institutional psychosocial interventions to boost students' resilience and their motivation to work hard towards achieving their aspirational goals.

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A Personal Account of a Chance Encounter with Postqualitative Inquiry at the Foot of a Mountain

Abstract

Postqualitative inquiry (PQI) compels us to think about educational studies in a different way. It requires ways of doing beyond regularised structures of humanist epistemology, ontology, and methodology. This article endeavours to describe my introduction to posthumansism and unplanned discovering of postqualitative inquiry through learning by doing. My (brief) journey with postqualitative inquiry has followed unexpected pathways, filtered through porous boundaries and discovered unheard voices in in-between spaces. This allows PQI to become more than knowledge-making. It is also a pedagogical and onto-epistemological venture and a rich, sensory and startling adventure of discovery into the entanglement of the social and the material.

Keywords: postqualitative inquiry, posthumanism, research methodology

Background

Postqualitative inquiry (PQI) compels us to think about educational studies in a different way. It requires ways of doing beyond regularised structures of humanist epistemology, ontology, and methodology (Adams St. Pierre, 2014a). More than just a critique of qualitative methodology and the ubiquitous *Cartesian-cogito* (Adams St. Pierre, 2014b), PQI veers towards poststructural and posthuman inquiry pushing.

This is not a conventional paper, rather a personal narrative of my introduction to PQI and my position as a researcher who has merely dipped a toe into 'the posts' (Adams St. Pierre, 2021) – postmodernism, poststructuralism, posthumanism. My first encounter with posthumanism and PQI was when I attended the 2018 *Pedagogies on a Damaged Planet* colloquium at the University of Cape Town School of Education (South African Education Research Association, 2018).

This exploration of PQI, draws on the post-event report of my impressions of the proceedings using reflections, reportage and photographs in a way that helped familiarise me with posthumanist concepts and theory. This paper does not present a sequential nor comprehensive record of the proceedings and presentations at the three-day colloquium. Rather the collage of personal impressions, interpretations, memories and images is employed to demonstrate the way PQI assisted me in discovering an alternative to qualitative research methodology. My speed-dating experience with posthumanism as well as my introduction to PQI, is best described by Braidotti's (2017, p. 7) understanding of philosophy as:

> *embedded and embodied, partial, and hence accountable cartographies of complex intellectual and social phenomena. It is less of an intellectual autobiography than the account of a nomadic crossing, a journey across texts, teachers, and traditions.*

Throughout, I present my reflections of the colloquium as it relates to posthuman and PQI thinking and concepts.

Beyond humanism

A posthumanist perspective considers humans as physically, chemically, and biologically entangled and dependent on their environment. We are part of a bigger and dynamic ecosystem on which we act but which also changes us.

> ***Reflection on the keynote presentation by Prof Karen Malone, Western Sydney University***
>
> *Anthropocene … crime scene: The main reason for the present struggles on this planet, it is argued by posthumansists, is the human centeredness of this geological period (unofficially known as the Anthropocene epoch) and the ways in which we shape, and are shaped by our material and our environment. … (I)t provides a lens to understand (1) the pace at which postindustrial humanity altered the planet and (2) how bodies are ethically and politically situated within material environments, according to Braidotti.* (Kruger, 2018, p. 8)

This viewpoint demands a different way of doing inquiry (Le Grange, 2018). According to Adams St. Pierre (2019, p. 3), thanks to the recent "ontological, posthuman, affective, new material, and new empirical turns", humanist social science research, can no longer adequately explain the complexity of the world. Nor can humans continue to be viewed through the lens of Descartes's cogito (Adams St. Pierre, 2021).

Qualitative research has reached its limits and to continue "working the ruins" by incorporating PQI into qualitative research rather doing something different from the start, is pointless. "If something different is to develop, we have to take Derrida's advice and overthrow the structure" (Adams St. Pierre, 2014b, p. 13). This does not mean humans are being jettisoned from research. Rather the focus on humans is de-emphasised and the presence of non-human elements acknowledged (Ulmer, 2017). This creates burgeoning possibilities for doing inquiry and "openings across academic fields regarding who and what has the capacity to know" (Ulmer, 2017, p. 1).

Adams St. Pierre admits it is not easy to do PQI. We battle to escape our training and the dominance of humanist epistemologies (Adams St. Pierre, 2014b). Also, the traditional silo approach to knowledge, despite being an epistemological project in itself, consigns ontology to the realm of philosophy and tends to disregard it in empirical research methodology. Another reason is the notion held that only two methodological alternatives are available to us – interpretive qualitative or positivist quantitative methodology. We cling to consecrated concepts like method and data even in everyday practices like talking with and observing people.

Yet, PQI is not methods driven, it re-formulates and re-assesses the entire research process from:

> *the objects of inquiry, methods used to produce 'data', what 'data' is, coding as a practice of meaning-making, and the formal conventions of academic article writing for journal publication.* (Taylor, 2016, p. 1)

Adams St. Pierre (2014b, p. 12) therefore suggests that researchers start their studies, not with "the methodology machine", but with an understanding of the onto-epistemologies that enable us to think such a thing as science, as well as the power

and politics embedded therein. More than knowledge-making, PQI is also a pedagogical, ontological, and ethical undertaking (Holt Daniels, 2017).

Moreover, PQI challenges the conventional and currently privileged humanistic epistemology and its corollaries, colonialism and nationalism, all considering humans the dominant source of agency. As a critical approach, PQI probes issues of power, coercion, marginalisation, and injustice but on a broader scale to include concerns about our planet (Ulmer, 2017).

> ***Arriving on campus on Day 2 - Jammie and jars***
>
> *We wind our way up to the foot of Table Mountain and park the car just below Jammie Steps and the Plaza in front of the memorial hall.*
>
> *Is this neoclassical-style building baking in the early morning sun, still called the Jameson Hall, I wonder?*
>
> *Originally it was named after Leander Starr Jameson, close friend of Cecil John Rhodes and to this day the symbol of anti-British sentiment to the Afrikaans speaking community - at least to those who still know of his existence and the history of the botched 1895 raid against the then* Zuid-Afrikaanse Republiek*, which set off of the* Engelse-oorlog *(or Anglo Boer war) of 1899 to 1902.*
>
> *Or has the University of Cape Town's 2017 proposal to honour Sara Baartman instead, been accepted?*
>
> *'Slave woman replacing the colonial warrior at the heart of UCT', wrote Philani Nombembe in Times Live in 2017; 'to enhance truth and reconciliation' said the official motivation letter.*
>
> *I don't know the answer but as I look away over the plain towards the Hottentots-Holland mountain range from where my colleague and I had started our journey this morning, Sara's appalling 'stage name' pops into my head: Sara, the Hottentot Venus, the human exhibit for sightseers and scientists of Europe.*
>
> *Earlier we had set off towards this mountain and later we shall trek back across the Cape Flats to go home, a journey in the same direction as the people of District Six who, after their forced removal to the outlying areas, continued to attend church and mosque in the wasteland which was now called Zonnebloem*. (Kruger, 2018, p. 1)

The topic of District Six, a historically and emotionally significant suburb of Cape Town, is the focus of the first presentation of day two. In his paper *Potestas and Potentia in Geomatics Education*, Dr Siddique Motala of the Cape Peninsula University of Technology's (CPUT) Civil Engineering and Surveying Department, draws on posthumanism to harness the power of memory. The fate of District Six looms large in the memory of former dwellers and their descendants. Established in 1867, it was located close to the city centre and Table Bay harbour and called home by freed slaves, merchants, artisans, labourers and immigrants. Despite being impoverished and overcrowded, the cosmopolitan community had a rich and varied religious and cultural life. In 1901 black residents were relocated to the Cape Flats, east of Cape Town. From 1966, after the government had adopted the Group Areas Act pronouncing District Six a 'whites only' area, about 60 000 people were forcibly removed and the buildings demolished. Decades long resistance resulted in the area remaining largely vacant (Miller, n.d.).

> ***Memory mapping and* potestas*:*** *Motala investigates the twin manifestations of power —* potestas *and* potentia *— contained in the geomatics learning experience …*

> *"In South Africa, geomatics education is an extension of the old land surveying education developed during the apartheid era", he explained. It emphasises more formal and official power or* potestas *referring to notions of mastery, control, authority, administration, compliance, jurisdiction, jurisprudence and professionalism. … Students research and produce their own stories about District Six using whatever medium/media and means (site visits, interviews etc.) they prefer before sharing their assemblages and journey with classmates. Storytelling and counter-mapping interventions help students join the dots to show new relationships, encourage creativity and practise micro-activism that show the impact of the profession on society.* (Kruger, 2018, pp. 4-5)
>
> ***Cavities meant to weaken:*** *Today, where District Six used to be located, it is mostly open space. A few structures like St Marks Anglican Church and the Muir Street Mosque were left standing and a few buildings have since been erected – townhouses and the first Cape Technikon building which is now CPUT.*
>
> *The original inhabitants were forcibly moved and scattered over the wide-open sand dunes known as The Flats, a political decision that eroded the matrix of the community and which led to severed ties, broken connections and wrecked relations among human and more-than-human, to time and place.*
>
> *Spaces meant to weaken, destabilise, diminish, damage and reduce, to destroy the ecomorphology.* (Kruger, 2018, p. 17)

Discovering postqualitative inquiry

The dominant image I have of the three-day event is finding myself in an abandoned zoo, lying on my back on the grass under a tree at the foot of Table Mountain talking, thinking, moving and feeling with nile lilies, binaries and entanglements. It is Sunday after lunch and we are tracing sensorial posthumanist assemblages with Prof. Karen Malone.

> ***Flux, flow and in-betweens:*** *I collect data without speaking or writing a word. All I have is a piece of trace paper and an oil pastel to map my experience. Later I use my map as reference to report back to the group. Learning as worlding without boundaries between us and the environment.* (Kruger, 2018, p. 11)

A most unusual way of meaning-making and setting up a world without subject-environment boundaries. Certainly anathema for the proponents of neoliberalised education and research that set great store by productivity and efficiency.

It is not until a colleague describes my post-conference report as an example of PQI that I reassess my ponderings as a text that could constitute 'inquiry'. My goal had been to show proof of attendance and help get my head around the topic. Now a cavity had opened up and I was compelled to add PQI theorists like Adams St. Pierre and Le Grange to my post-colloquium reading list.

> ***Tubers versus taproots:*** *Yesterday, I learnt about Deleuze and rhizomatic mapping from Dr. Motala. Unlike a tree boring down with taproots and side roots, rhizomes, like that of an agapanthus or nile lily found growing prolifically along the roads bordering the campus, … forms a subterranean network …* (In the same way), *research cannot be isolated, neither in time nor space. All is always connected. Past, present and future, Here, there, anywhere and everywhere, visible/invisible, materiality/spectres. Things might be added, removed, erased, spoken about or kept secret. But all is always available to be excavated. … These connections are there to be discovered, tracked and exposed like an archaeologist or a geologist would. And mapped … like a land surveyor, ….* (Kruger, 2018, p. 3)

Deleuze and Guattari's concept of rhizomatic interweaving, alters how we conceptualise and theorise about inquiry. It tolerates multiple and non-hierarchical entry and exit points in data representation and interpretation taking one into unexpected directions. It randomly creates a multiplicity of pathways including to the in-between spaces making it difficult to represent in a linear fashion (Kinchin & Gravett, 2020).

> ***Porosity:*** *On day three, as we leave the Neville Alexander Building where the colloquium is being held, we turn left and go up the stairs to Library Road and past the African Studies building. A tiny ficus sapling growing out of a crack on the concrete staircase, catches our attention. This we decide is our spot and we unpack the brown paper bag we had been given as part of Dr Theresa Giorza's pedagogical laboratory or Pedlab – charcoal, clay, string, photographs of rock art. For the next half hour we spend observing, interacting with and exploring the materiality of the location and the more-than-human elements we find there. … As I move further up the stairs …, I notice a complex yellowish pattern on the floor. My eyes follow the markings upwards along the concrete pillar towards the ceiling and notice tiny stalactites. Both structures have been formed by lime deposits leached from the concrete as water leaks through the cracks in the building.*
>
> *Porosity – the measure of space in between.*
>
> *In-between spaces.*
>
> *The patterns I had noticed are formed from the human-made material to create something completely new. In the process it has also permanently altered the materiality of the building itself, possibly even weakening the structure by creating more spaces in between the substrate.*
>
> *But does the removal of material and an increase in porosity always lead to emptiness or a void?*
>
> *Not in the case of spongy bone in mammals. It is exactly the circular lattice work consisting of dense and compact bone cells and lacuna that support the lines of stress and provides strength to the bone while at the same time keeping it light and ensure ease of movement.*
>
> *The spaces in between soil particles are important too. Well-aerated soil stores groundwater and oxygen needed for plant growth.*
>
> *Cavities house potential.*
>
> *Fissures allow flow.*
>
> *Cracks allow growth.*
>
> *Absence as potential.*
>
> (Kruger, 2018, pp. 16-17)

PQI, being open-ended, always becoming, openly challenges and covertly creates, disrupts and gives voice to the unheard (Grellier, 2013), to indigenous perspectives and experiences through shared conceptualisations of the inextricable human-nonhuman world and the broader web of life (Le Grange, 2018).

> ***Ancestral home-coming:*** *Sara's journey started in the Gamtoos, Eastern Cape in 1789 as a member of the Gonaqua subgroup of the Khoikhoi and ended in France after years as a caged, half-naked human display and object of fascination in London and Paris. After her death in 1816 Sara ended up a science specimen for French naturalists and anatomists, zoologists and physiologists depicting the 'link' between animals and humans. Sara's body was dissected and her brain and genitals*

> *placed in jars and put on display at the Musée de l'Homme (Museum of Man) until 1974. Only in 2002, on request of former president Nelson Mandela, did the French Government return her remains and Sara was laid to rest at Hankey near her ancestral home. Ironically now her name is or will again be associated with a symbol of this country's British and colonial past. Going/coming. All in motion. To and from. Life as a loop.* (Kruger, 2018, p. 2)

The "post" systems of thought, according to Adams St. Pierre (2014b), does not share descriptions of reality nor of human beings with humanism. It thinks differently about agency, language, knowledge, power, reason, method and connections. Unlike the anthropocentric humanist thought of Kant, it applies a flattened ontology, think Braidotti's non-hierarchical nature-culture distinctions (Vivaldi, 2021) and the Heidegger-influenced Object Oriented Ontology (OOO). A flat ontology rejects favouring humans over non-human objects. Whereas Kant contrasts observable facts, events or products of our cognition (phenomena) with objects or event that exists independently of human sensory perception (*noumenon*), in a flat ontology, *noumena* are not defined by the interactions with or effects on other objects including humans.

> ***Correlations****:*
>
> *Body*
>
> *Minerals*
>
> *Land*
>
> *Sara Baartman's body-mind*
>
> *Jameson's minerals*
>
> *District Six's heritage*
>
> *Human, nature, culture*
>
> *Tracking our past through not-officially sanctioned (that is, not-*potesta*) stories and by being open to possibilities, we can uncover our secret, silent and censored relationships with one another and with more-than human ... even if we have labelled them 'the other' and 'less-than-human'.* (Kruger, 2018, p. 10)

As I reflect on my reflections of my chance encounter with PQI via the colloquium on posthumanism, and as I learn more about it, I am increasingly drawn to this manner of inquiry for its suppleness, its sensorial richness, its tolerance of creative, daring and experimental ways to survey and for its potential to surprise. Approaching inquiry without following a particular method leaves me unencumbered to discover connections related to my study in everyday encounters with ideas, people and materiality shaping kinship in the now, in the past and in the future. I can relinquish my role as protagonist, and stand on equal footing with the physical, social, intellectual environment – always becoming, always embodied.

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