Joseph Zajda
Suzanne Majhanovich   *Editors*

Discourses of Globalisation, Ideology, Education and Policy Reforms

Springer

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Volume 26

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Discourses of Globalisation, Ideology, Education and Policy Reforms

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TO REA, NIKOLAI, BELINDA, SOPHIE AND IMOGEN

Foreword

A major aim of *Discourses of Globalisation, Ideology, Education and Policy Reforms,* which is the 26th volume in the 36-volume book series G*lobalisation, Comparative Education and Policy Research*, edited by Joseph Zajda and his team, is to present a global overview of selected scholarly research on global and comparative trends in dominant discourses of globalisation, ideology, education and policy reforms in comparative education research. It provides an easily accessible, practical yet scholarly source of information about the international concern in the field of globalisation, ideology, education and policy reforms. Above all, the book offers the latest findings on discourses surrounding on-going education and policy reforms.

The book explores conceptual frameworks and methodological approaches applicable in the research covering globalisation, ideology, education and policy reforms. Using a number of diverse paradigms, ranging from critical theory to globalisation, the authors, by focusing on globalisation, ideology and social justice, attempt to examine critically recent trends in education policies and their impact on schooling.

More than ever before, there is a need to understand and analyse both the intended and the unintended effects of globalisation and forces of globalisation on nations, organisations, communities, educational institutions and individuals around the world. This is particularly relevant to the evolving and constantly changing notions of nation-states, national identity, and citizenship education globally. Current global and comparative research demonstrates a rapidly changing world where citizens are experiencing a growing sense of alienation, uncertainty and loss of moral purpose.

The book contributes, in a very scholarly way, to a more holistic understanding of globalisation, ideology, education and policy reforms. The book is both rigorous and scholarly and is likely to have profound and wide-ranging implications for the future of education policy and reforms globally.

East Melbourne, VIC, Australia   Joseph Zajda

Editorial by Series Editors

Volume 26 is a further publication in the Springer Series of books on Globalisation, Comparative Education and Policy Research, edited by Joseph Zajda.

Discourses of Globalisation, Ideology, Education and Policy Reforms, which is **volume 26** in the 36-volume book series Globalisation, Comparative Education and Policy Research, edited by Joseph Zajda and Suzanne Majhanovich, presents a global overview of the nexus between globalisation, ideologies and standards-driven education reforms and implication for equity, democracy and social justice. Globalisation and the competitive market forces have generated a massive growth in the knowledge industries that are having profound effects on society and higher educational institutions. One of the effects of globalisation is that the education sector is compelled to embrace the corporate ethos of the efficiency, performance and profit-driven managerialism. As such, new entrepreneurial educational institutions in the global culture succumb to the economic gains offered by the neoliberal ideology and governance defined fundamentally by economic factors.

The book explores the ambivalent and problematic relationship between the state, globalisation and education reforms discourses. Using a number of diverse paradigms, ranging from critical theory to globalisation, the authors, by focusing on globalisation, ideology and education reforms, attempt to examine critically recent trends in the political, social, economic and educational constructs affecting the nature of education reforms.

When discussing the politics of education reforms, and role of the state, and dominant ideologies defining policy priorities, we need to go beyond the technicist and business-oriented model of education, which focuses on accountability, efficiency and performance indicators. Why? Because, apart from the dominant human capital and rate of return, driving efficiency, profit, and performance indicators, there are other forces at work as well. From the macro-social perspective, the world of business, while real and dominant, is only one dimension of the complex social, cultural and economic world system. At the macro-societal level, we need to consider the teleological goal of education reforms. Are we reforming education

systems to improve the quality of learning and teaching, academic achievement, and excellence, and do we hope to change our societies, creating the 'good society'?

At the level of critical discourse analysis, we need to consider dominant ideologies defining the nature and the extent of political and economic power, domination, control, the existing social stratification, and the unequal distribution of socially and economically valued commodities, both locally and globally. They all have profound influences on the directions of education and policy reforms. Many scholars have argued that education systems and education reforms are creating, reproducing, and consolidating social and economic inequality (Carnoy & Rothstein, 2003; McLaren & Farahmandpur, 2005; Zajda, 2015a, 2021; Milanovic, 2016).

The book offers a synthesis of current research findings on globalisation and education reforms, with reference to major paradigms and ideology. The book analyses the shifts in methodological approaches to globalisation, education reforms, paradigms, and their impact on education policy and pedagogy. The book critiques globalisation, policy and education reforms and suggests the emergence of new economic and political dimensions of cultural imperialism. Such hegemonic shifts in ideology and policy are likely to have significant economic and cultural implications for national education systems, reforms and policy implementations. The book also evaluates discourses of globalisation, cultural imperialism, global citizenship, human rights education and neo-liberal ideology. It is suggested there is a need to continue to analyse critically the new challenges confronting the global village in the provision of authentic democracy, equality, social justice and cross-cultural values that genuinely promote a transformative pedagogy. There is also a need to focus on the crucial issues at the centre of current and on-going education reforms, namely global citizenship, human rights education, social justice and access to quality education for all, if genuine culture of learning, and transformation, characterised by wisdom, compassion and intercultural understanding, is to become a reality, rather than policy rhetoric.

In addressing the topic globalisation, ideology and politics of education reforms, some authors, like Zajda and Majhanovich, analyse the on-going trends in education reforms for academic excellence, standards, equity and global competitiveness. They critique and evaluate a neo-liberal and neoconservative education policy; meta-ideological hegemony and paradigm shifts in education; globalisation processes impacting on education and policy reforms; global university rankings; internationalisation; competition for international students among universities, both locally and globally; promoting economic competitiveness, national identity and social equity through education reforms; and teaching globalism through a human rights framework and social justice. Hyde, using Peter Berger's and Thomas Luckmann's notion of internalisation, examines critically globalised discourses of neoliberal performativity and responsibilisation. The author argues that governments and educational institutions, in their quest for global competitiveness, are influenced by comparative education data analysis (OECD, PISA, and the World Bank), in order to focus on standards and economic performance. Other authors examine the PISA effect on education reforms in Finland and in France (Regnault Elisabeth, Copreaux Lucie, Landrier-Guéret Brigitte and Mignot Romain-Bernard), African

Descendants' globalisation challenges, human rights and education dilemmas across the African Diaspora: Flipping the script and rewriting narratives (Kassie Freeman), developing an education planning tool to create the conditions for social justice in a global village (Sigamoney Naicker & Ambalika Dogra), Coping with globalisation and disruption: The making of higher education reforms in Singapore (Michael H. Lee), *Neriage,* as Japanese craft pedagogy: cultural scripts of teaching that promote authentic learning (Mohammad Reza Sarkar Arani, Masao Mizuno & Yoshiaki Shibata), diversity and global citizenship in educational policies: Debates and prospects (Kathrine Maleq & Abdeljalil Akkari), quality assurance or quantity assurance: performance based funding in higher education in Ontario, Canada (Melanie Lawrence), teacher education for global citizenship: What can international practicum offer? (Mellita Jones, Renata Cinelli & Mary Gallagher), and education for sustainable development and environmental ethics (Issac Paul).

The authors focus on major and dominant discourses defining educational reforms: *globalisation*, *social change*, *democracy* and *ideology.* These are among the most critical and significant dimensions defining and contextualising the processes surrounding the politics of education reforms globally. Furthermore, the perception of globalisation as dynamic and multi-faceted processes clearly necessitates a multiple-perspectives approach in the study of education reforms. In this the book, the authors, who come from diverse backgrounds and regions, attempt insightfully to provide a worldview of current developments in research concerning education reforms both locally and globally. The book contributes in a very scholarly way to a more holistic understanding of the nexus between globalisation, ideology and education reforms.

We thank the anonymous international reviewers, who have reviewed and assessed the proposal for the continuation of the series (volumes 25–36), and other anonymous reviewers, who reviewed the chapters in the final manuscript.

Preface

Discourses of Globalisation, Ideology, Education and Policy Reforms, which is **volume 26** in the **36**-volume book series Globalisation, Comparative Education and Policy Research, edited by Joseph Zajda and Suzanne Majhanovich, presents a global overview of the nexus between globalisation, ideologies and standards-driven education reforms and implication for equity, democracy and social justice. Globalisation and competitive market forces have generated a massive growth in the knowledge industries that are having profound effects on society and higher educational institutions. One of the effects of globalisation is that the education sector is compelled to embrace the corporate ethos of efficiency, performance and profit-driven managerialism. As such, new entrepreneurial educational institutions in the global culture succumb to the economic gains offered by the neoliberal ideology and governance defined fundamentally by economic factors. Both governments and educational institutions, in their quest for global competitiveness, excellence, quality and accountability in education, increasingly turn to international and comparative education data analysis. All of them agree that the major goal of education is to enhance the individual's social and economic prospects, which can only be achieved by providing quality education for *all*. Clearly, these new phenomena of globalisation have in different ways affected the current developments in education and policy around the world. First, globalisation of policy, trade and finance has some profound implications for education and reform implementation. On the one hand, the periodic economic crises (e.g. the 1980s, the financial crisis of 2007–2008, also known as the Global Financial Crisis or GEC in 2008), coupled with the prioritised policies of the International Monetary Fund (IMF) and the World Bank (e.g. SAPs), have seriously affected some developing nations and transitional economies in delivering quality education for all.

Second, the policies of the Organisation for Economic Co-operation and Development (OECD), the UNESCO, the World Trade Organization (WTO) and the General Agreement on Trade in Services (GATS) operate as powerful forces, which, as supranational organisations, shape and influence education and policy.

By examining some of the major education reforms and policy developments and merging paradigms in a global culture, particularly in the light of recent shifts in education reforms and policy research, this volume provides a comprehensive picture of the intersecting and diverse discourses of globalisation, education and global competition-driven reforms. The impact of globalisation on education policy and reforms is a strategically significant issue for us all. This volume, as a source-book of ideas for researchers, practitioners and policymakers in globalisation and education reforms, provides a timely overview of the current changes in education reforms both locally and globally.

East Melbourne, VIC, Australia   Joseph Zajda

Contents

Series Editor

Joseph Zajda, BA (Hons), MA, MEd, PhD, FACE, co-ordinates and lectures in graduate courses – MTeach courses: (EDFX522, EDSS503 and EDFD546) – in the Faculty of Education and Arts at the Australian Catholic University (Melbourne Campus). He specialises in globalisation and education policy reforms, social justice, history education, human rights education, and values education. He has written and edited 48 books and over 150 book chapters and articles in the areas of globalisation and education policy, higher education, history textbooks, and curriculum reforms. Recent publications include: Zajda, J. (Ed). *(2021) 3rd International Handbook of Globalisation, Education and Policy Research.* Dordrecht: Springer; Zajda, J. (Ed). *(2020).* Globalisation, Ideology and Education Reforms*: Emerging Paradigms.* Dordrecht: Springer; Zajda, J. (Ed). *(2020).* Human Rights Education Globally. Dordrecht: Springer; **Zajda**, J (Ed.). (2020). *Globalisation, Ideology and Neo-Liberal Higher Education Reform.* Dordrecht: Springer; Zajda, J. & Rust, V. (2020). *Globalisation and Comparative Education*. Dordrecht: Springer; Zajda, J. & Majhanovich, S. (Eds.) (2020). *Globalisation, Cultural Identity and Nation-Building: The Changing Paradigms*. Dordrecht: Springer; Zajda, J. (2019) (Ed.). *Globalisation, Ideology and Politics of Education Reforms.* Dordrecht: Springer; Zajda, J. (2018). *Globalisation and Education Reforms: Paradigms and Ideologies.* Dordrecht: Springer; Zajda, J. (2017). *Globalisation and National Identity in History Textbooks: The Russian Federation*. Dordrecht: Springer; Zajda, Tsyrlina-Spady & Lovorn (2017) (Eds.).*Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks.* Dordrecht: Springer; Zajda & Ozdowski (2017). (Eds.), *Globalisation and Human Rights Education* Dordrecht: Springer; Zajda & Rust (Eds.) (2016). *Globalisation and Higher Education Reforms.* Dordrecht: Springer; editor and author of the *Second International Handbook on Globalisation, Education and Policy Research*. Springer, 2015. http://www.springer.com/education+%26+language/book/978-94-017-9492-3; Zajda, J. (2014). The Russian Revolution. In G. Ritzer & J. M. Ryan (Eds.), *The Wiley-Blackwell Encyclopedia of Globalization Online*; Zajda, J. (2014); Zajda, J. (2014). Ideology. In D. Phillips

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He is the editor of the **36-volume** book series Globalisation and Comparative Education (Springer, 2013 and 2024).

He edits the following journals:

http://www.jamesnicholaspublishers.com.au/journals/ct/; Editor, *Curriculum and Teaching*, volume 35, 2021 http://www.jamesnicholaspublishers.com.au/journals/es/; Editor, *Education and Society*, volume 38, 2021 http://www.jamesnicholaspublishers.com.au/journals/wse/ Editor, *World Studies in Education,* volume 21, 2021

His works are found in 445 publications in 4 languages and some 11,210 university library holdings globally.

He is the recipient of the 2012 **Excellence in Research Award**, the Faculty of Education, the Australian Catholic University. The award recognises the high quality of research activities, and particularly celebrates sustained research that has had a substantive impact nationally and internationally. He was also a recipient of the **Australian Awards for University Teaching** in 2011 (Citation for Outstanding Contributions to Student Learning, **for an innovative, influential and sustained contribution to teacher education through scholarship and publication).** He received the Vice Chancellor's **Excellence in Teaching Award,** at the Australian Catholic University (Melbourne Campus). He was awarded an ARC Discovery Grant (with Monash University) for 2011–2015 for a comparative analysis of history national curriculum implementation in Russia and Australia ($315,000). Elected as **Fellow** of the Australian College of Educators (June 2013).

Completed (with Professor Fred Dervin, University of Helsinki) the UNESCO report: *Governance in education: Diversity and effectiveness. BRICS countries*. Paris: UNESCO (2021).

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About the Contributors

Abdeljalil Akkari is Professor and the director of the research group on international education at the University of Geneva, Switzerland. He is also visiting professor at the Al-Farabi Kazakh National University, Kazakhstan. Abdeljalil Akkari is a regular consultant for UNESCO and other international organisations. He was the Dean of research at the Higher Pedagogical Institute HEP-BEJUNE (Bienne, Switzerland). His main experience and major publications include studies on international cooperation, educational planning, multicultural education, teacher training and educational inequalities. His principal research interests are currently centred on intercultural education, teacher education and reforms of educational systems in a comparative and international perspective.

Mohammad Reza Sarkar Arani (Nagoya University) is a Professor of Teacher Education in the Graduate School of Education and Human Development at the Nagoya University, Nagoya, Japan. His research areas of expertise include teacher education in theory and practice, the culture foundations of teaching and learning and pedagogy. He has written extensively on cross-cultural analysis of lessons in Singapore, Malaysia, Iran, Japan, South Korea, etc., and 'lesson study' as a Japanese approach of delivering 'science of improvement' and as a global solution for improving teaching and enhancing learning. He has participated in international conferences and published articles in various national and international journals in English, Japanese and Persian.

Landrier-Guéret Brigitte is a physics teacher in middle school (Collège Saint-Etienne, Sens). She received a PhD degree from 'Université of Pierre et Marie Curie' (Paris, France) and wrote scientific articles about plasmas research. She supervises students in master's degree of Education (CUCDB, Dijon) and wrote an article about the effects of digital tools and social networks on education (co-author: Cindy Capelle, to be published for CRSEA in 'L'Harmattan'). She has been the coordinator for a Sustainable Development pedagogical project between Finnish, Danish and

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Renata Cinelli (Faculty of Education and Arts, Australian Catholic University, Sydney, Australia) is a Senior Lecturer in the National School of Education, Australian Catholic University. Renata has both interest and experience working with and in communities of cultural diversity. She has led 10 international experiences for Australian pre-service teachers in countries such as Solomon Islands, Kiribati, and Italy, as well as experience conducting culturally appropriate research with Aboriginal peoples in urban, regional, and remote communities. Renata has taught units on service learning, community engagement, and Aboriginal and Torres Strait Islander histories and cultures, and she supervises PhD students undertaking research in culturally diverse communities. Renata's practice has been recognised through teaching excellence citations, a community engagement award, and an Early Career Researcher award.

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Regnault Elisabeth (University of Strasbourg) is Associate Professor in Educational Sciences and has an Habilitation in Comparative Education. She teaches in the INSPE (Long Life Education Faculty) in Strasbourg in France. Her fields of research are the Comparative Education and the Intercultural Education. She is involved in two laboratories (LISEC, and CRSEA-CUCDB, Dijon). She has published a book, in 2017, *Comparative Education between Measure and Culture, between Global and Local* (L'Harmattan).

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Heritage in Higher Education Research and Practice, and *Black Colleges* (with M. Christopher Brown, II). She is the former president of the Comparative and International Education Society. In recognition of her leadership, *Diverse Issues in Higher Education* named her one of the 2019 Top 35 Women in Higher Education in the USA. Also, the Higher Education Leadership Foundation presented her with the Dr Eugene D. Stevenson Jr. Lifetime Higher Education Achievement Award, and recently selected her to serve as an inaugural Senior Fellow, serving as a strategic thought leader for aspiring HBCU leaders. Prior to her current presidency, she was elected by the Board to serve as Interim President of the Southern University System, the nation's only Historically Black College System. As System President, she provided oversight for the System's five campuses. Before being named as Interim President, she was the third and first woman System Vice President for Academic and Student Affairs for the Southern University and A & M College System and Professor of Education. She has held leadership positions at some of the highest ranked higher education institutions in the USA, including serving as the first Dean for Academic Advancement at Bowdoin College, where she was a member of the President's senior cabinet and was responsible for assisting the College with developing programs to ensure that all students reached their academic potential.

Mary Gallagher (Faculty of Education and Arts, Australian Catholic University, Canberra, Australia) is a teacher, academic and practitioner specialising in adult learning, curriculum development and best practice pedagogy. She is a doctoral researcher and lecturer at the Canberra campus of the Australian Catholic University in the areas of sociology, education studies, literacy, and professional experience. With international development experience spanning fifteen years in Asia and Central/Eastern Europe, she is recognised as a leading technical expert in the areas of adult education and training. Mary has a proven ability to manage and guide cross-cultural training, review, and monitoring teams. Over a decade of close engagement with Islamic education in Indonesia, Mary has built a strong reputation as a knowledgeable and skilful curriculum reviewer, training facilitator and mentor (2006 – 2017) Mary has co-led 3 international experiences for Australian pre-service teachers to the Solomon Islands, and received commendations for teaching excellence. Her approaches reflect a deep understanding of the challenges and opportunities in developing, and delivering, transformative education models within culturally diverse communities.

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Mellita Jones (Faculty of Education and Arts, Australian Catholic University, Ballarat, Australia) is Senior Lecturer. She is the international community engagement coordinator for the National School of Education at the Australian Catholic University. Her international community engagement work has involved consultancy work in Brunei Darussalam and Solomon Islands, where she has led teacher professional learning workshops. She also has extensive experience in leading Australian pre-service teacher immersion programs in Solomon Islands since 2009 and Kiribati (2016-2018). Her research is concerned with effective teacher education for social justice, school-university partnerships, and reflective practice. Mellita has won a number of teaching excellence and community engagement awards and has reviewed and written teacher education units for UNESCO's teacher education program for the Pacific region. She currently serves on the Executive committees for the Australian Teacher Education Association (ATEA) and the World Federation of Associations of Teacher Education (WFATE).

Michael H. Lee (The Chinese University of Hong Kong) teaches in the Department of History in the Chinese University of Hong Kong. He formerly served as Instructor in the Department of Educational Policy and Administration of the Hong Kong Institute of Education, and Research Associate in the Comparative Education Policy Research Unit of the Department of Public and Social Administration, City University of Hong Kong. His publications cover education reforms, comparative education, privatisation in education, and globalisation. His latest book chapter 'Upper secondary social studies curriculum in Singapore and national identity' was accepted for publication in *Globalisation, cultural identity and nation-building: The changing paradigms* (Springer, the Netherlands, 2020).

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Suzanne Majhanovich (Western University) is Professor Emerita and Adjunct Research Professor at the Faculty of Education, Western University, London, Ontario, Canada. She has published numerous articles and edited books, and has guest-edited (with different others) five special issues of the *International Review of Education.* Her research interests include globalisation, internationalisation and education restructuring, as well as first and second language acquisition and the teaching of English and French in international contexts. She was the senior author of the French text series *En français s'il vous plait* and also worked at times on contract for the Ministry of Education developing curriculum guidelines for French

as a Second Language and International Languages. She has been active in the Ontario Modern Language Teachers' Association and was awarded a Life Membership in 2000. Before joining a faculty of education, she taught secondary school French as a Second Language and German. She co-edited the special issue of the *International Review of Education: Journal of Lifelong Learning* (with Diane Napier and Norberto Fernández Lamarra), 'New Times, New Voices' based on selected papers from the thematic group on Higher/adult Education of the 2013 WCCES in Buenos Aires, which appeared as volume *60*(4) 2014. Professor Majhanovich also co-edited several volumes on Comparative Education for Sense Publishers. In June 2013, she was honoured to receive the David N. Wilson Award for contributions to Comparative and International Education from the Comparative and International Education Society Canada (CIESC) at the annual meeting in Victoria BC.

Kathrine Maleq (University of Geneva) is a research and teaching fellow at the University of Geneva, Switzerland. Previously, she was responsible for the design, coordination, implementation, and evaluation of nation- wide and regional education for peace programs for an NGO. Her research focuses on global citizenship education, multicultural education, preschool-family collaboration from a cross-cultural perspective, and early childhood education in the Global South.

Masao Mizuno (Tokai Gakuen University) is an Associate Professor at the School of Sports and Health Sciences, Tokai Gakuen University, Aichi, Japan. His research areas focus on lesson study, curriculum development in school, and teacher training programs for promoting active learning. He has written articles extensively on Japanese lesson studies. He is particularly interested in issues related to school-based curriculum development for realising high-quality learning. He is an expert in schoolteachers' and university faculty members' professional development for designing effective teaching in practice. He has participated in international conferences

Sigamoney Naicker was appointed on the National Commission for Education Support Services by then President Nelson Mandela. The task of the commission to establish a new dispensation for special needs education in South Africa. He was the first national director of Inclusive Education in South Africa. Sigamoney has worked in various areas of the education system in a senior management capacity which includes curriculum, assessment, early childhood education, adult education and human capital development. Prior to joining government Sigamoney was a lecturer at the University of Western Cape. He was recently awarded an extraordinary Professorship in Education. His first book on inclusive education was titled, Curriculum 2005, An Introduction to Inclusive Education: A Space for all. He has written and co-edited some of the first publications on inclusive education in South Africa. Sigamoney's area of specialisation includes social justice and education as well as the relevance of the discourse of inclusive education in addressing the challenges in developing contexts. His latest publication is titled Inclusive Education in South Africa and the Developing World: The Search for an Inclusive Pedagogy. Sigamoney has also run the New York, London, Oslo and Cape Town marathons.

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Yoshiaki Shibata (Nagoya University) is an Associate Dean of the Graduate School of Education and Human Development, and a Professor of Methods of Education in the Department of Educational Sciences at Nagoya University, Nagoya, Japan. His research areas of expertise include lesson study, lesson analysis, problem-solving learning, teacher education and educational technology. He has developed and applied a mixed research method the so-called Transcript-Based Lesson Analysis to clarify students learning process and to provide text-based classroom discourse analysis. He contributes to expand lesson studies in various local, national and international school communities such as Mongolia, Indonesia, Malaysia, Singapore, Korea, China, etc. He has participated in international conferences and published papers in various national and international journals in English and Japanese.

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Chapter 1
Globalisation and Competitiveness-Driven Education Reforms for Academic Excellence and Standards

Joseph Zajda (iD)

Abstract This chapter analyses major and on-going trends in education reforms for academic excellence, standards, equity and global competeiveness. The chapter critiques and evaluates a neo-liberal and neoconservative education policy, meta-ideological hegemony and paradigm shifts in education, together with major globalisation processes impacting on education and policy reforms, both locally and globally. Meta-ideological hegemony dictates economic competitiveness, academic standards, and global monitoring of educational quality and standards.

Keywords Education policy reforms · Globalisation · The global-local-dialectic · The globalised meta-ideology · Global university rankings · Human capital · Human rights education · Ideological shifts in education · Higher education policy · Models of governance · Neo-liberal higher education policy · Social stratification · Global university rankings · Internationalization · Quality education

Globalisation and Education Reforms: Introduction

Globalisation as a Cultural Transformation of Modenity

Using a critical theory discourse, we could argue that the teleological purpose of the global economy and globalisation in general, is to consolidate, maintain, expand and protect wealth, power, and privilege. Some authors argued that globalisation is also propelled by a dominant neo-liberal and bourgeois hegemony, which legitimates an 'exploitative system' (Apple, 1999; Klees, 2002; McLaren & Farahmandpur, 2005, Rizvi & Lingard, 2010; Zajda, 2021). A number of factors, including neo-liberal ideology, with its logic of accountability, efficiency, performance indicators and profit-maximization have contributed to 'high and rising inequality', as reported in the *2019 Human Development Report*. Growing economic

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inequality is causing 'alarm in industrialized as well as developing countries' (Krishna, 2020, p. 3).

According to the Oxford dictionary, the word 'globalisation' in the modern sense, was first employed in 1930. It was widely used by researchers in the 1960s. Furthermore, Marshall McLuhan, a Canadian professor of English at the University of Toronto, who analysed the media, coined the term 'the medium is the message', in his cutting-edge book *Understanding Media: The Extensions of Man*, published in 1964. He also coined the term 'global village'. Since then, a number of social theorists (Wallerstein, 1989; Giddens, 1990; Robertson, 1992; Appadurai, 1996; Hirst & Thompson, 1996; Castells, 2000; Carnoy & Rhoten, 2002; Sklair, 2002; Stiglitz, 2002; Rust & Jacob, 2005; Ritzer & Rojek, 2020; Fan & Popkewitz, 2020; Ampuja, 2021) argued that globalisation was one of the outcomes of modernity, which was characterised by the nexus of new structural political, economic, cultural, and technological developments (Wallerstein, 1979; Castells, 1989; Apple, 2002; Biraimah et al., 2008; Zajda, 2021). Globalisation, according to Ampuja (2021), is now the 'most important keyword' of the global triumph of neoliberal capitalism. He argues that these concepts have become 'dominant in the social sciences, to the point of establishing a new theoretical orthodoxy that we can define as globalisation theory' (Ampuja, 2021). Consequently, globalisation has also acquired a new meta-ideology that carries strong elements of Western ideologies (Daun, 2021).

Some critical theorists tended to refer to globalisation as a new form of cultural imperialism (Carnoy, 1977; Apple, 1999; McLaren & Farahmandpur, 2011; Tomlinson, 2012; Boyd-Barrett, 2018; Gómez García & Birkinbine, 2018; Gudova, 2018). This new cultural and economic imperialism is represented by a *standardisation of commodities*—the same designer labels appearing in shops around the world. Globalisation results, at times, in a global recomposition of the capital-labour relations or the subordination of social reproduction to the reproduction of capital. In addition, globalisation leads to the globalisation of liquid capital, the deregulation of the labour market, the outsourcing of production to cheap and more competitive labour markets, and the intensified competition among transnational corporations (Held & McGrew, 2000). This idea is supported Wallerstein and others (Hirst & Thompson, 1996; Robertson et al., 2002; Daun, 2021) who also suggest that globalisation is the ultimate expression of the ideology of consumerism, driven by market expansion and profit maximisation (UNDP, 1999; see also UNDP, 2019). In critiquing globalisation and its impact on education and policy reforms, we need to know how its 'ideological packaging' affect education practices around the world. As Carnoy and Rhoten (2002), argued, there was a need to assess a possible nexus between globalisation, ideology, education reforms and their impact on schooling:

> In assessing globalization's true relationship to educational change, we need to know how globalization and its ideological packaging affect the overall delivery of schooling, from transnational paradigms, to national policies, to local practices (Carnoy & Rhoten, 2002, p. 3).

Current education and policy reforms globally target academic standards, education quality and global competitiveness, as described below, in particular standards-driven and outcomes-defined policy change, as well as marketisation and quality/efficiency driven reforms.

The Impact of Globalisation on Education Policy and Reforms

There is no doubt that economic, political, cultural and social dimensions of globalisation have a profound effect on all spheres of education and society, both locally and globally. The on-going economic restructuring and policy reforms among nation-states, propelled by global competition, together with the ubiquitous global monitoring of educational quality and standards, are some of the imperatives of the globalisation process (Rizvi & Lingard, 2010; Bologna Process, 2020; Zajda, 2021). Global monitoring of educational quality and standards in the higher education sector was initiated by the *Bologna Process*, during the 1998–1999 periods. Bologna Process is an intergovernmental higher education reform process that includes 49 European countries and a number of European organizations, including European University Association (EUA). Its main goal is to 'enhance the quality and recognition of European higher education systems and to improve the conditions for exchange and collaboration within Europe, as well as internationally' (Bologna Process, 2020). It was launched in 1998–1999, to establish goals for reform in the participating countries, such as the three-cycle degree structure (bachelor, master's, doctorate), and 'adopted shared instruments, such as the European Credits Transfer and Accumulation System (ECTS) and the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG)' (Bologna Process, 2020).

Standards-Driven and Outcomes-Defined Policy Change

One of the effects of forces of globalisation is that educational organisations, having modelled its goals, priorities and strategies on the entrepreneurial business model, are compelled to embrace the corporate ethos of the efficiency, accountability and profit-driven managerialism. Hence, the politics of education reforms in the twenty-first century reflect this new emerging paradigm of standards-driven and outcomes-defined policy change (Zajda, 2015). Some policy analysts have criticized the ubiquitous and excessive nature of standardization in education, which made it difficult, if not impossible, to implement the UNESCO 2015 *Education for All* (EFA) policy goals, promoting equity and quality education for all (Carnoy, 1999; Beyer, 2002; de Vries & Egyedi, 2007; Odeh, 2010; UNESCO, 2015c).

Globalisation and the competitive market forces have generated a massive growth in the knowledge industries that are having profound effects on society and educational institutions. In the global culture, the university, as other educational institutions, is now expected to invest its capital in the knowledge market. It increasingly acts as an entrepreneurial institution. Such a managerial and entrepreneurial re-orientation would have been seen in the past as antithetical to the traditional ethos of the university of providing knowledge for its own sake (see also Sabour, 2005; Zajda, 2015). It can be said that globalisation may have an adverse impact on education. One of the effects of globalisation on education in all spheres is that it is compelled to embrace the corporate ethos of the efficiency and profit-driven managerialism. This is particularly evident in higher education. The new entrepreneurial university in the global culture succumbs to the economic gains offered by the neoliberal ideology (Saunders, 2010; Rizvi, 2017; Zajda, 2021).

Rizvi (2017) suggests that the current discourse of educational reforms, driven by a neo-liberal ideology, has resulted in the intensification of 'social inequalities' (Rizvi, 2017, p. 10). He argues that globalisation while bringing 'great benefits to most communities', at the same time reinforces inequalities:

> Global mobility of people, ideas and media has brought great benefits to most communities, but clearly in ways that are uneven and unequal (Rizvi, 2017, p. 12).

The emerging challenges for education and policy reforms include a drive towards improving academic achievement in secondary schools. Our key findings indicate that current trends in most BRICS countries' treatment of governance in education rely on the discourses of accountability, performance and output driven schooling, and that they are characterized by the new high-stakes testing through the final year tests in secondary schools (Dervin & Zajda, 2021). The drive for global competitiveness means that recent education policy reforms in secondary education tend to be standards- and (global) accountability- driven. BRICS governments' and MoEs' push for high academic achievement in secondary schools has been influenced by the emerging standardizing regimes of global educational governance such as the OECD PISA assessment (Johansson, 2018, Rinne, 2020).

Globalisation, Marketisation and Quality/Efficiency Driven Reforms

Globalisation, marketisation and quality/efficiency driven reforms around the world since the 1980s have resulted in significant and major structural and qualitative changes in education and policy, including an increasing focus on the "lifelong learning for all", or a "cradle-to-grave" vision of learning and the "knowledge economy" in the global culture. Governments, in their quest for excellence, quality and accountability in education, increasingly turn to international and comparative education data analysis. All of them agree that the major goal of education is to enhance the individual's social and economic prospects. This can only be achieved

by providing quality education for *all*. Students' academic achievement is now regularly monitored and measured within the 'internationally agreed framework' of the OECD's Programme for International Student Assessment (PISA). This was done in response to the growing demand for international comparisons of educational outcomes (OECD, *Education policy outlook 2015: making reforms happen*). Yet, not all schools are successful in addressing the new academic standards imperatives, due to a number of factors, both internal and external. Cohen (2011), for instance, attributed failure of education reforms in the USA due to fragmented school governance and the lack of coherent educational infrastructure.

To measure levels of academic performance in the global culture, the OECD, in co-operation with UNESCO, is using *World Education Indicators* (WEI) programme, covering a broad range of comparative indicators, which report on the resource invested in education and their returns to individuals (OECD, 2020, *Education at a Glance* – OECD *Indicators*).

Since the 1980s, higher education policy and reforms globally have been influenced by the grand narratives of globalisation, neo-liberalism, human capital and economic rationalism. Higher education policy reforms in the 1980s represented a drive towards economic rationalism, where the increasingly traditional role of the university was replaced by a market-oriented and entrepreneurial university. It has led to entrepreneurial university awards. For instance, the University of Huddersfield has been awarded the prestigious *Times Higher Education* Entrepreneurial University of the Year award for 2013. The neo-liberal university, as noted by Saunders and others, emphasizes the "role of the faculty not as educators, researchers, or members of a larger community, but as entrepreneurs" (Saunders, 2010, p. 60). Accordingly, the current redefinition of academics into "entrepreneurs is widespread and is consistent with neo-liberal ideology as is the commodification, commercialization, and marketization of the fruits of faculty labour" (Saunders, 2010, p. 60; see also Parker, 2011; Gulbranson, 2019).

Discussion

Globalisation, marketisation and quality/efficiency driven reforms around the world since the 1980s have resulted in major structural and qualitative changes in education and policy, including an increasing focus on academic standards and global competitiveness. Governments, in their quest for excellence, quality and accountability in education, increasingly turn to international and comparative education data analysis. All agree that the major goal of education is to enhance the individual's educational, social and economic prospects (UNESCO, 2015a, b). This can only be achieved by providing quality education for *all*. Students' academic achievement is now regularly monitored and measured within the internationally agreed framework of the OECD's Programme for International Student Assessment (PISA). This was done in response to the growing demand for international comparisons of educational outcomes (OECD, 2019; OECD, 2020). To measure levels of academic performance in the global culture, the OECD, in co-operation with UNESCO, is

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The above critique of globalisation, policy and education suggests new and evolving economic, social and political dimensions of cultural imperialism (see Zajda, 2020b). Such hegemonic shifts in ideology and policy are likely to have significant economic and cultural implications for national education systems, reforms and policy implementations (see Zajda, 2020a, b). For instance, in view of GATS constrains, and the continuing domination of multinational educational corporations and organisations in a global marketplace, the "basis of a national policy for knowledge production may be eroded in a free-market context of a knowledge-driven economy" (Robertson et al., 2002, p. 494; see also Brown et al., 2002; Armstrong, 2001). This erosion signifies the corresponding weakening of the traditional role of the university, being the pursuit of knowledge for its own sake (Nisbet, 1971; Metz, 2019; Sabour, 2021). Sabour (2021) in his chapter 'The impact of globalisation on the mission of the university', argues that the strategic role of the university had "shifted away from its principle mission of acquiring knowledge and searching for the 'Truth' to a new position where it sought to defend political convictions and social rights" (Sabour, 2021). Furthermore, the university was 'expected to invest its capital in the knowledge market'. It had to act as an 'entrepreneurial institution' (Sabour, 2021).

Conclusion

The above trends in globalisation, education and society, and their overall impact on individuals in different cultural settings, may also reflect both a growing social and cultural alienation and a Durkheimian sense of anomie in the world invaded by forces of globalisation, cultural imperialism, and global hegemonies that dictate the new economic, political and social imperatives and the regime of truth. These newly constructed imperatives in educational policy tend to operate as global master narratives, playing a hegemonic role within the framework of economic, political and cultural hybrids of globalisation. The above analysis of education policy reforms shows a complex nexus between globalisation, ideology and education reforms – where, on the one hand, democratisation and progressive pedagogy is equated with equality, inclusion, equity, tolerance and human rights, while on the other hand, globalisation is perceived, by some critics at least, to be a totalising force that is widening the socio-economic status (SES) gap, and cultural and economic capital between the rich and the poor, and bringing increasing levels of power, domination and control by corporate bodies and powerful organisations. We need to focus on solving the crucial issues at the centre of current and on-going education reforms, especially the provision of authentic democracy, human rights and social justice. Such actions will contribute to the emergence of a genuine culture of learning, and transformation, characterised by wisdom, compassion, and intercultural understanding.

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Chapter 2
The Social Construction of Globalised Education Discourses: Inhabiting a World of Performativity, Competition and Responsibilisation

Brendan Hyde

Abstract Drawing on Peter Berger and Thomas Luckmann's notion of internalisation, this chapter argues that twenty-first Century learners are now born and socialised into a world through schooling in which globalised discourses of neoliberal performativity and responsibilisation are taken for granted as being the norm. However, this experience of the world is not necessarily fixed and pre-given. It is a construction. These discourses have been socially constructed in the process of globalised education reforms by governments and educational institutions in their quest for global competitiveness and comparative education data analysis. Educators themselves have forgotten the alternative educational discourses of happiness, learning for life, and so on, that were once more prevalent. Influenced by the purpose of social constructionism, this chapter argues for the need to take a critical stance towards this taken-for-granted knowledge to promote a more socially just and inclusive experience of education for learners and to foster a sense of agency and self-efficacy.

The Social Construction of Globalised Education Discourses: Introduction

By way of introduction, I would like to present three short anecdotes that highlight the concerns being expressed in this chapter. The first comes from Reay and Wiliam (1999), the second from Keddie (2016), and the third from a conversation that I

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recently had with a group of pre-service teachers in the final year of their Bachelor of Education course:

> For Hannah what constitutes success is correct spelling and knowing your times tables. She is an accomplished writer, a gifted dancer and artist and good at problem solving yet none of those skills makes her a somebody in her own eyes. Instead she constructs herself as a failure, an academic non-person, by a metonymic shift in which she comes to see herself entirely in terms of the level to which her performance in the SATs is ascribed (Reay & Wiliam, 1999, pp. 325–346).

> For Danielle (Year 5), 'getting good grades' meant that she would not have to be a waitress like her cousins 'who didn't do very well as school'. . .Similarly, Annie (Year 5) spoke of a good education protecting her from having to take up menial jobs, as she stated: 'you wouldn't want to be a rubbish man picking up stuff from the streets' (Keddie, 2016, p. 112).

This group of students were growing more and more concerned by the minute. "But how exactly do you want us to set this out?" one of them asked. I replied that they could set out their work in whatever way they chose, provided that they addressed each of the criteria on the marking rubric. "But will I be marked down if I use bullet points?" asked another. "Does it matter if I put some of this information into a table?" asked yet another. "And, exactly how many references should I include – in fact, do I even need to include references?" chimed in another anxiously. As I began to reply that they should exercise their sense of agency and that their own voices should be reflected in their work, one of the students murmured, almost to herself, "I have to do well in this assessment task – I just cannot fail" (personal recalled anecdote).There is something that all three of these short anecdotes have in common. Each highlights a tension between the learner as an individual with her or his own attributes and talents, and the learner as one who is compelled to position her or himself to get good grades in those areas of the curriculum that are deemed to "matter", or which are seen to be of value, in order to succeed. This reflects the social reality that "aligns educational achievement with level of capacity to take advantage of the economic and material benefits of the social world" (Keddie, 2016, p. 113).

Through a close analysis, however, I would like to take this one-step further by suggesting that it is no longer that case that students are simply compelled to position themselves to compete within the external parameters of achievement that are deemed to be of value. Rather, I argue that they are now born and socialised into a world, through schooling, in which globalised discourses of neoliberal performativity and responsibilisation are taken for granted as being the norm. That is, twenty-first century learners' experience of school is, for them, fixed and pre-given. It is what they understand to be normal since they know of no other way of being in the world.

However, discourses concerning globalised education reform are neither fixed nor pre-given. They are constructions. These discourses have been socially constructed in the process of globalised education reforms by governments and educational institutions in their quest for global competitiveness and comparative education data analysis. High stakes achievement tests, such as TIMSS (Trends in International Mathematics and Science Study), PISA (Program for International Student Assessment), and NAPLAN (National Assessment Program – Literacy

and numeracy) in Australia continue to encourage and to fuel these socially constructed discourses.

In this chapter, I draw on Peter Berger and Thomas Luckmann's treatise, in particularly on their notion of internalisation, to show how the neoliberal discourses of performativity and responsibilisation – both of which are features of globalized education reforms – have been socially constructed. Further, and in being influenced by social constructionism, I argue for the need to take a critical stance towards this taken-for-granted understanding of the world to promote a more socially just and inclusive experience of education for learners, and to foster within them a sense of agency and self-efficacy.

The Social Construction of Reality

The central concept of Berger and Luckmann's (1966) treatise is that individuals and groups of people interacting in a social system create, over time, concepts or mental representations of each other's actions, and that these concepts eventually become habituated into reciprocal roles played by the actors in relation to each other. When these roles are made available to other members of society to enter into and play out, the reciprocal interactions are understood to be institutionalised. In the process, meaning becomes embedded in society. Knowledge and people's conceptions (and beliefs) of what reality is become embedded in the institutional fabric of society. Reality is, therefore, said to be socially constructed.

Thus, human beings together create and the sustain all social phenomena through social practice. Berger and Luckmann detail three particular moments in the process of socialisation through which this occurs. The first is externalisation. This occurs when people act on the world in some manner, creating an artefact, or a practice. For instance, this could occur when an individual, or community, develops a concept, such as gender, and then seeks to externalise this idea in some way by, for example, telling a story, or writing a book about it, or creating an artwork that depicts this idea in some way. The artefact (the story, the book, the artwork) then enters the social realm. Other people begin to re-tell the story, or read the book, or look at the artwork, and in this way, the artefact begins to take on a life of its own. Externalisation largely takes place within institutions, since while "the social products of human externalisation have a character *sui generis*. . .it is important to stress that. . .Human being is impossible in a closed sphere of quiescent interiority" and the human being must, therefore, "ongoingly externalize itself in activity"(p. 70, italics in the original).

The second movement is known as objectivation, whereby the artefact – a product of human activity – is "available to both [its] producers and to other men [sic] as elements of a common world" (Berger & Luckmann, 1966, p. 49). It has become the object of consciousness for the society in which it was developed – a feature of the natural world itself rather than a construction of the interactions of human beings (Burr, 2003).

Berger and Luckmann (1966) argue that externalisation and objectivation are moments in a continuing dialectical process. There is a relationship between human beings (the producers of artefacts) and the social world. That is "man (not, of course, in isolation but in his collectivities) and his social world interact with each other. The product acts back upon the producer" (p. 78, parentheses in the original). The result of such interaction renders three essential characterisations of the social world, namely that "*Society is a human product. Society is an objective reality.* [And that] *Man is a social product*" (p. 79, italics in the original).

The third moment in the process is internalisation, by which "the objectivated social world is retrojected into consciousness in the course of socialisation" (Berger & Luckmann, 1966, pp. 78–79). Other people, including future generations, are born into and inhabit a world in which an idea already exists, and begin to internalise it as a part of their own consciousness, and understanding of the nature of the world.

Berger and Luckmann's (1966) account demonstrates how the world can be socially constructed by the social practices of people. At the same time, it demonstrates how people experience the world as if the nature of their world is pre-given and fixed (Burr, 2003), rather than a construction.

There are two other key notions in Berger and Luckmann's (1966) treatise which have relevance for this discussion. These are habitualisation and institutionalisation (as alluded to above). Habitualisation consists of any human activity, repeated frequently, that forms a pattern which "can then be reproduced with an economy of effort and which. . .is apprehended by its performer *as* that pattern" (p. 71, italics in the original). Habitualised actions bring with them the "important psychological gain that choices are narrowed" (p. 71). While there might be an infinite number of ways in which one could complete a given project, or undertaking, habitualisation effectively narrows the choice to one particular way. Habitualisation thus provides direction for activity and renders it unnecessary to have to define again each specific step for specific situations.

Institutionalisation occurs "whenever there is a reciprocal typification of habitualised actions by types of actors" (Berger & Luckmann, 1966, p. 72). They are available to all members of the particular social group that constitutes the institution. Institutions are not created instantaneously, but are rather historically formed. That is to say, institutions have a history of which "they are the products" (p. 72). They are experienced as an objective reality since they have a history, which predates the individual's birth. The institutions "are *there*, external to [the person], persistent in their reality" (p. 78, italics in the original).

They control human activity by establishing predefined patterns of conduct, which steers the institution in one particular direction, as opposed to other possible directions. Institutions generally establish themselves in collectivities, and are comprised of large numbers of people. The development of "specific mechanisms of social controls. . .becomes necessary with the historicisation and objectivation of institutions" (pp. 79–80).

Importantly, Berger and Luckmann (1966) draw attention to the fact that institutions are a humanly produced and constructed reality. They require legitimation, that is, the ways in which they are explained and justified to each and subsequent

generation of people who belong to them. Such legitimations "are learned by the new generation during the same process that socializes them into the institutional order" (p. 79).

In the following section of this chapter, I apply the three moments of socialisation as espoused by Berger and Luckmann (1966) to show how the neoliberal discourses of performativity and responsibilisation – both of which are features of globalised education reforms – have been socially constructed. I do this with particular reference to governance, and policy making.

Externalisation and Objectivation – Discourses That Have Been Socially Constructed

Influenced by the trends of globalisation more generally, Rinne (2020) astutely notes that education at the national level of western countries:

> ...involves not only language, concepts, classifications and preferences per se but entangle in their webs a shared sequence of new cultural and political myths, sagas and beliefs, produced in a new space of meanings that swear allegiance to community and to progress. . . .our collective understanding of education as a whole and its relationship to concepts like equality, social justice, or economy and culture is reshaped (Rinne, 2020, p. 27).

More specifically, the artefacts which are produced that contain and promote such cultural and political myths and beliefs are, in the first instances at least, a series of educational declarations and policies. These are produced, over significant periods of time (in this case since the early 1980s), with the purpose of externalising the idea that good and effective education ought to be reformed in such a way that it strives for global competitiveness, excellence and accountability. They advocate that students' success in the classroom be measured in terms of how well they perform and compete in tests and examinations. In turn, schools, and indeed education systems, are to be held to account in terms of their comparability with each other, both nationally and internationally.

Such artefacts have been in production since the early 1980s. They have served to shift the educational agenda away from, for example, learning how to live (Neil, 1917), engaging in inquiry for creative transformation (Freire, 1972), empowering individuals in a process for becoming (Biesta, 2009) and contributing significantly to personal and collective happiness (Noddings, 2003, p 1). Instead, these artefacts have steered educational reform towards the neoliberal values of performativity, productivity, economic competitiveness and measurement, as well as the comparison of education outcomes, both nationally and internationally.

A recent statement indicative of this shift may be found in Australia in the *Alice Springs (Mparntwe) Education Declaration* (Education Council, 2019). This declaration maintains that improving educational outcomes for all young Australians "is central to the nation's social and economic prosperity and will position young people to live fulfilling, productive and responsible lives" (p. 4). Statements on education

elsewhere also indicate a similar shift. For instance, the Ministry of Education, New Zealand *Te Tahuhu o te Matauranga* (2014) states that, "Education is vital to building a strong and successful society" and that "Our education system performs well overall and in global terms, and it must if young New Zealanders are to be equipped with the values, knowledge and skills to be successful in the 21st Century" (p. 4). Likewise, the Department for Education in England (2014) maintains, "The national curriculum provides pupils with an introduction to the essential knowledge that they need to be educated citizens. It introduces pupils to the best that has been thought and said; and helps engender an appreciation of human creativity and achievement" (p. 6).

However, as artefacts produced by nation states and educational institutions, policies are not necessarily always reflective of a cohesive and systematic attempt to promote and guide best practice in any particular arena or aspect of social life. National policy-making is, as Ball (2007) maintains:

> inevitably a process of bricolage: a matter of borrowing and copying bits and pieces of ideas from elsewhere, drawing upon and amending locally tried and tested approaches, cannibalising theories, research, trends and fashions and not infrequently flailing around for anything at all that looks as though it might work. Most policies are ramshackle, compromise, hit and miss affairs, that are reworked, tinkered with, nuanced and inflected through complex processes of influence, text production, dissemination and, ultimately, re-creation in contexts of practice (p. 44).

Further, Dale et al. (2016) note that such policies are framed by institutional opportunity structures in education systems, meaning "the deeply ingrained conceptions about how education systems 'work', how they get things done, the set of rules, conventions, sedimented practices through which the system is administered" (pp. 63). They provide direction for how policies and structured are framed, similar to the way in which institutions control human activity by establishing predefined patterns of conduct (Berger & Luckmann, 1966).

Thus, these artefacts that have been produced in the form of policies are far from perfect or complete manifestations of ideas. They have been constructed by drawing on multiple sources and ideas and, to some extent, re-created in the context of practice. When others read and engage with these artefacts – politicians, policy-makers, school principals and teachers – they begin to take on a life of their own. As a product of human activity, these artefacts (policies) are available to both those who were responsible for their production and to others as elements of a common world (Berger & Luckmann, 1966). These have, then, become the object of consciousness for the context in which they were developed. As Burr (2003) would argue, they have become a feature of the natural world itself rather than a construction of the interactions of human beings.

As Berger and Luckmann (1966) have noted, externalization and objectivation are moments in a continuing dialectical process. There is a relationship between human beings (the producers of artefacts, in this case, educational declarations and policies) and the social world. They argue, "man (not, of course, in isolation but in his collectivities) and his social world interact with each other. The product acts back upon the producer" (p. 78, parentheses in the original), such that "*Man is a social*

product" (p. 79, italics in the original). Applying this notion to the present investigation suggests that those who have developed, implement, and complied with these educational statements and policies – politicians, educational planners, school principals, teachers and students alike – are, in effect, themselves social products of the neoliberal values, ideals and discourses for which these very artefacts advocate, in particular those of performativity and responsibilisation. It is to these that the focus of this chapter now briefly turns.

Neoliberal Performativity and Responsibilisation

Performativity refers to "a culture and mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change – based on rewards and sanctions (both material and symbolic)" (Ball, 2003, p. 216, parentheses in the original). In other words, the performances of individuals serve as measures of output, or productivity, and they represent the worth, value or quality of a person within a particular field of judgement.

In neoliberal educational reform, students' success in the classroom is measured in terms of how well they perform and compete. Students come to learn that the successful student is one who is good at doing what a test or examination requires, and who can successfully apply her or himself to whatever is required to succeed, for with the promise of success comes the opportunity to acquire a "good" score, and hence a "good" job and rewarding lifestyle (Hyde, 2021a). The better one performs, the greater the chances of being able to take advantage of the economic and material benefits of the social world. In this way, students are "incited" to "conduct themselves as competitive subjects" (Wilkins, 2012, p. 202).

In education influenced by the neoliberal agenda, there are a myriad of opportunities for students to perform and compete. Such opportunities abound not only in the academic arena, but also in the sporting field as well as in the popularity stakes. When students organise themselves in response to attainment targets, performance indicators, achievement standards and the like – which they are effectually forced to do – they are living "an existence of calculation" (Ball, 2003, p. 215).

However, the targets, goals, achievement standards and so forth that matter, or count, in this existence of calculation are neither decided upon by the school or classroom teacher in negotiation with students. They are externally prescribed according to utility and what is good for the economy, and manifest in the forms of classroom ability settings (streaming) and standardized tests, such as NAPLAN (National Assessment Program – Literacy and numeracy) in Australia, the Standard Attainment Tests (SATs) in the UK, and the Progressive Achievement Tests (PATs) in New Zealand. They also comprise high stakes achievement tests, such as TIMSS (Trends in International Mathematics and Science Study), PISA (Program for International Student Assessment). These constitute the fields of judgement that encompass and represent students' worth and value. In terms of the performativity of students, Thompson (2010, p. 416) astutely notes that, like teachers, students are:

> ...exposed to cultures that prioritise measurement and testing, reporting using mandatory
> standards and systems, state-sanctioned teaching methods, reformed organisational curricu-
> lum policies. In short, student are at the centre of those...practices and pedagogies [that]
> shape the subjectivities of students.

As a result, students in contemporary classrooms are compelled to position them-
selves to compete within the external parameters of achievement that are deemed to
"matter", or which are of value. The research of Ball (2003), Thompson (2010),
Wilkins (2012) and Keddie (2016) demonstrates that when students do this, their
efforts may be viewed as highly strategic and active. They are continuous endeav-
ours of calculation, in which students comply with the demands of performativity
through learning to "playing the game" (Keddie, 2016.

When students position themselves to perform and to compete, it is perhaps
not surprising that they ways in which they think about their achievement and
success reflects a sense of neoliberal responsibilisation (Davies & Bansel, 2007;
Shamir, 2008; Wilkins, 2012, Keddie, 2016). At the most fundamental level,
responsibilisation operates so as to reconfigure the roles of individuals – managers,
employees, consumers, students, and so forth – mobilising them to actively under-
take and perform self-governing tasks (Shamir, 2008). Responsibilised individuals
are those who have been "persuaded to willingly take over responsibility for areas of
care that were previously the responsibility of government" (Davies & Bansel, 2007,
p. 251). Thus, the newly responsibilised individuals come to fulfil their obligations
to the nation, to the state, and to their employers by pursuing economic wellbeing for
themselves and their families.

By way of example, Shamir (2008) notes that welfare programs in many countries
now link welfare entitlements to the recipient's willingness to share the responsibil-
ity for enhancing their own earning capabilities. Catch-cries such as "no rights
without responsibilities", along with the notion of "partnerships" (that is, "we are
all in this together") are indicative of the culture in which the individual is persuaded
to take on the responsibility for things that were previously obligations of govern-
ment and social and economic systems more broadly.

Neoliberal responsibilisation, in the sphere of education, is the mechanism by
which students are positioned as self-sustaining individuals whose choices "are
rational expressions of free will, the consequences of which they will solely bear
and are responsible" (Keddie, 2016, p. 117). Achievement and underperformance
are seen as self-determined choices on the part of students, which are freely made.
But, with the choice comes the responsibility for, and consequences of, the decision
made by the student. In this way, students are praised for achievement and success,
but are admonished for underachievement. Both of these outcomes are viewed as the
result of the decision made by students for which they themselves are responsible,
rather than shortcomings of an education system that may have failed to address
issues such as adequate funding, appropriate education programs, and disadvantage
(Hyde, 2021a).

While these two particular neoliberal discourses have been socially constructed,
as discussed above, twenty-first century learners (as well as their teachers) have

themselves become social products of these neoliberal values as a result of the continuing dialectical process between externalization and objectivation.

Internalisation

Internalisation, the process by which "the objectivated social world is retrojected into consciousness in the course of socialisation" (Berger & Luckmann, 1966, pp. 78–79) is the third movement in this social construction of reality. Other people, including future generations, are born into and inhabit a world in which an idea already exists, and begin to internalise it as a part of their own consciousness, and understanding of the nature of the world.

Not only are twenty-first century learners products of these neoliberal values and discourses that are espoused by education and policy statements, they are now born and socialised into a world, through schooling, in which globalised discourses of neoliberal performativity and responsibilisation not only exist, but are taken for granted as being the norm. That is, twenty-first century learners' experience of school is, for them, fixed and pre-given. Being good, compliant, strategic, and performing learners who are responsible for their own success (or lack thereof) is what they understand to be normal since they know of no other way of being in the world.

Taking a Critical Stance Towards Taken-for-Granted

Those who engage with the social construction of reality, or social constructionism, as it is commonly known, argue that a key purpose is to take a critical stance towards taken-for-granted knowledge, that is, to be critical of the notion that observation of the world unproblematically yields its nature to the observer (Burr, 2003; Gergen, 1985, 2001; Hyde, 2020; Parker, 1997). There is a need, such scholarship argues, to maintain a suspicion of assumptions in relation to how the world appears to be, and that the categories with which human beings apprehend the world do not necessarily refer to real divisions. One is asked to "suspend belief that commonly accepted categories or understandings receive their warrant through observation" (Gergen, 1985, p. 267).

In taking such a critical stance, perhaps the first thing to call into question is the purpose of education. The documents mentioned earlier in this chapter – the Alice Springs (Mparntwe) Education Declaration (Education Council, 2019), Te Tāhuhu o te Matauranga (2014) and The national curriculum in England Framework document (2014) – place an unmistakable emphasis on learners acquiring the knowledge and skills to be competitive in a globalised world. As such, they reflect the neoliberal values of performativity, productivity and economic competitiveness that have come

to characterise much of the discourse on globalisation. They are informed by common achievement tests, such as TIMMS, PISA, and in Australia, NAPLAN.

However, the purpose of education has not always been expressed in such overt neoliberal terms. Going back to the early twentieth century, A.S Neil (1917) saw his own notion of the purpose of education as being at odds with the policy of his day, perhaps best expressed in his claim that, "I want to teach my bairns how to live; the Popular Educatorswant to teach them how to make a living. There is a distinction between these two ideals" (p. 46). He believed that learners have the ability to direct their own learning and that it is their right to do so. In addition, Neil believed that a key purpose of education was to be happy and interested in life, and that imposed authority was unjustified. Instead, he trusted the natural inclinations of children and saw no need to externally and purposefully influence their behaviour (Neil, 1960).

For Paulo Freire (1972), education is concerned with the process of humanisation, which liberates learners from the powers that view them as empty vessels merely to be filled, or deposited, with knowledge. Such liberation is a praxis, that is "the action and reflection of men [sic] upon their world in order to transform it" (p. 52). An important notion of Freire's approach to education is the concept of "problem-posing" in which the taken-for-granted social roles and expectations of people are made problematic. In problem-posing, people "develop their power to perceive critically *the way they exist* in the world *with which* and *in which* they find themselves" (p. 56, italics in the original). For Freire, problem-posing stimulates authentic reflection and action upon reality, that is, praxis, viewing people as "engaged in inquiry and creative transformation" (p. 56).

Importantly for Freire (1972), there is an inseparability between learning and being, that is, between learning and ontology (see also Hyde, 2021b). Learning is grounded in the learner's own being, in their interactions with the world, and in who they are *becoming*. Problem-posing affirms learners as "beings in the process of *becoming* – as unfinished, incompleted beings in and with a likewise unfinished reality" (p. 56–57, italics in the original). The unfinished character of the learner and the transformational character of reality therefore requires that education must therefore be an ongoing activity.

More recently, Nel Noddings (2003), like A.S. Neil (1917) maintains that a key aim of education is happiness. Noddings disqualifies the explicit push towards schools being places that should focus on academic achievement or as incubators for the production of successful graduates who contribute meaningfully to a society; one in which success is measured in terms of literacy, numeracy and scientific abilities. Instead, she argues that happiness and education are intimately related. Noddings comes from a premise that happiness should be an aim of education, and a good education should contribute significantly to personal and collective happiness. For Noddings, a "feature of happy classrooms is a continually negotiated balance between expressed and inferred needs" (p. 242).

Arguing that we have lost sight of the values and purpose of education, Gert Biesta (2009) argues that there is a need to reconnect with the question of purpose in

education, especially in light of a recent tendency to focus discussions about education almost exclusively on the measurement and comparison of educational outcomes. For Biesta, what constitutes good education is a composite question that moves beyond what he describes as the "learnification" of education, and involves qualification, socialisation and the process of individuation. While these three functions of education are interconnected, discussions about the purpose of education need to distinguish between the ways in which education can contribute to qualification, socialisation and individuation. Ultimately for Biesta, and in reflecting the ideas of Freire, education is concerned with empowering individuals in a process for becoming. Any education "worthy of its name should always contribute to processes [of individuation] that allow those being educated to become more autonomous and independent in their thinking and acting" (p. 41).

The thinking of writers such as Neil (1917), Freire (1972), Noddings (2003), and Biesta (2009) above, together with a number of others, including Dewey (1916), Apple (1979), McLaren (1980), Giroux (1981), Britzman (1986), Macedo (1994) and Shor (1996) (to name but a few) represents alternative educational discourses that stand in stark contrast to the neoliberal imperatives that dominate the present milieu. Such scholarship has taken a critical stance towards the taken-for-granted knowledge and structures of the neoliberal education agenda.

Such alternative discourses are neither new nor novel. They have been advocated for quite some time now, and many have been put into practice in various contexts with great success. However, contemporary educators seem to have forgotten these alternative educational discourses that were once more prevalent. It seems that they, too, have fallen victim to "the cocktail of a narrow vision, widespread standardisation and abstraction, an exclusively fiscal view, a depleted curriculum, deprofessionalised teachers and market driven accountability systems" (Gorur, 2016, p. 612). That is, their professional identities have become social products of the neoliberal values and imperatives, which devalues tacit and professional knowledge (Gorur, 2013) as a result of the continuing dialectical process between externalization and objectivation. Professionally speaking, they cannot remember a world otherwise.

However, the neoliberal school reform agenda is not going away any time soon. Globally speaking, cultural, economic and technological exponential growth have raised the value of education as a desirable commodity, and this has increased the importance of ensuing that students have access to high standards and quality education (Zajda, 2015, 2020). The challenge lies in being able to take a critical stance towards the way in which education in the contemporary milieu *appears* to be, and to incorporate – especially at the localised and individual school level, that is, at the "micropolitical level of engagement" (I'Anson & Allen, 2006, 276) – mechanisms for the activation of alternative discourses such as those indicated above. Such discourses could also include the notion of a rights-respecting curriculum and the promotion of student voice (Hyde, 2021a, c).

Conclusion

Discourses concerning globalized, neoliberal education reform are neither fixed nor pre-given. They are constructions. As has been shown in this chapter, these discourses have been socially constructed in the process of globalised education reforms by governments and educational institutions in their quest for global competitiveness and comparative education data analysis. Yet, and as I have argued in drawing on the treatise of Berger and Luckmann (1966), twenty-first century learners are now born and socialized into a world, through schooling, in which these discourses of neoliberal performativity and responsibilization are taken for granted by them as being the norm. It behoves policy makers, academics, curriculum advisers, school principals and classroom teachers to take a critical stance towards such taken-for-granted globalised and neoliberal discourses in education. Taking such a critical stance opens up for them the space to recover and rediscover some of the alternative discourses that shift the educational agenda towards learning how to live, engaging in inquiry for creative transformation, empowering individuals in a process for becoming, and contributing significantly to personal and collective happiness. When such alternative discourses are considered, educational practitioners are positioned to provide a more socially just and inclusive experience of education for learners, and to foster within them a sense of agency and self-efficacy.

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Chapter 3
The PISA Effect on Education Reforms in Finland and France

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Abstract This chapter compares the PISA effect on education policy and reforms in Finland and France. It discusses how the media and public opinion accept international rankings and positive or negative statements concerning the educational policy of those countries. The authors also analyse globalisation, educational output, efficiency, standards, performances, competences, competitiveness, rankings, accountability, and the culture of evaluation. Since the beginning of the 2000s, new concepts have spread in the educational world: globalisation, output, efficacy, efficiency, standards, performances, competitiveness, rankings, accountability, culture of evaluation, and management. It resulted in the multiplicity of educational external evaluations in most countries: for example, international surveys about the efficacy of educational systems such as PISA. The goal of this chapter is to analyse the impact of PISA on the national educational reforms in Finland, rated as a high ranking country in Europe, and in France, rated below the average in the OECD, and the reactions of the actors in the system connecting to the Top down or Bottom up processes. The Top Down is descending, as it is a centred-based approach of educational policies illustrated by France. The Bottom Up process is ascending, as it is a decentralised approach of educational policies illustrated by Finland. The international context, the New public management and PISA survey are presented. The Finland results and educational politics since the 2000s are compared to the French one. Since 2012, in Finland, the orientations of the 'new reform' are determined (2016–2020), that define the end of the common base and prioritise an interdisciplinary teaching. Local authorities define their educational priorities along with national priorities. Like in France, the State sets up a frame concerning the national curriculum that will be enforced on the whole territory. Contrary to France, once the policy frame is set, the implementation of the curricula is currently under the local and regional actors' responsibility. In France, since 2010, there are a number of policy and education reforms linked to PISA results. In a comparative point of view, similarities and differences between the two countries are analysed in

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the end of this chapter. The differences are numerous and are linked to the Top down and Bottom up processes.

The PISA Effect on Education Reforms in Finland and France: Introduction

Contextualised Questioning

Since the beginning of the 2000s, in the wake of De Ketele's works (2011), new words have spread in the educational world: globalisation, output, efficacy, efficiency, standards, performances, global competitiveness, rankings, accountability, culture of evaluation, and management, which have resulted in numerous educational external evaluations in most countries. International surveys about the efficacy of educational systems, such as PISA, have become a reference to legitimate all kinds of decisions and reforms. The ensuing interpretation by the media and public opinion accepted country rankings and positive or negative statements concerning the educational policy of those countries. The purpose of those surveys, as well as the methods they use seem to be of a minor importance, as internationa rankings of schools has become a top priority.

As a result of globalisation, the paradigm of comparative education is currently shifting. Van Daele (1993, 16) defines comparative education as '*studying phenomena and educational facts interacting with the social, political, economic and cultural context, comparing their similarities and differences in two or several regions, countries, continents or at the world level, so as to better understand the specificity of each phenomenon within its own system and to produce some valid or desired generalisations, the final aim being to improve education*'. This is a horizontal method, as it similarly compares two or three countries.

The current paradigm is rather vertically based, as it studies the impact of what is global, at a local level. This is the reason why the concept coined by Robertson (1995) 'glocalisation', which unites global and local, has become a key construct to understanding the relationship between those movements, and showing how they refer to the same phenomenon, and especially with the emergence of international surveys and their subsequent educational standards. Dimitrova (2005) also mentions the dialectics of globalisation, as a permanent 'game' between local and global. Therefore, the pressures on the educational systems do meet, but without necessarily leading to converging solutions, despite the existence of the political patterns and the ensuing reforms.

Research Questions Arising from This Text

What are the impacts of the PISA results on the national educational reforms in
   Finland (rated as a high ranking country in Europe) and in France (rated below the
   average in the OECD)?
What is the influence of global over local?
Are reactions towards PISA connected to the ranking process or to the Top Down or
   Bottom Up processes?

The Top Down process is descending, it is a centred-based approach of educational
policies, illustrated by France. The Bottom Up process is ascending, it is a
decentralised approach of educational policies, illustrated by Finland.

Specificity of the Comparison Between the Two Countries: Finland and France

The choice of the countries can also be explained as follows. Due to Landrier-Guéret
Brigitte belonging to an Erasmus + programme, she has developed a professional
network in Finland, involving Elisabeth Regnault, Lucie Copeaux and Romain-
Bernard Mignot as French specialists.

   The use of the 'Glocalisation' concept (Robertson, 1995), combining both global
and local levels, and influencing one another through, not only the PISA survey on
national reforms, but also on teachers' perceptions of academic chievent and PISA
indicators. Such a comparison refers to both a vertical and a horizontal process as
they will be submitted to a simultaneous comparison.

   One country will be studied, according to one educational pattern, as five
educational patterns coexist in Europe. Finland refers to the Nordic pattern, France
to the Latin pattern. They differ in structure and in pedagogy. Will these two patterns
be reflected in the questionnaires and interviews? Bulle (2010) has developed a
typology: by crossing the structure and the pedagogy, she comes up with five
educational patterns in the developed world:

- The Nordic pattern: Denmark, Finland, Iceland, Norway, Sweden. With a
  non-differentiated structure, a unified school system, the same subjects taught
  in junior high schools, no separation between primary schools and junior high
  schools, academic orientation at 16 – progress and building oriented - centred on
  general skills and know-how expected from the pupils and on the development of
  the personality.
- The Latin pattern: Brazil, Spain, France, Greece, Italy, Romania, Turkey. With a
  differentiated structure, a separation between primary schools and junior high
  schools, orientation at 14 (Turkey) or at 16 (France) and an academic structure
  based on national curricula split in subjects with numerous graded tests.

- The East-Asian pattern: Korea, Japan, China, Russia. With a mixed structure, a partially common structure in junior high schools, a separation between primary schools and junior high schools, an orientation at 16 and an academic orientation.
- The Germanic pattern: Germany, Austria, Belgium, Luxemburg, The Netherlands, Switzerland. With a differentiated structure and an academic orientation.
- The British pattern: Australia, Canada, the U.S.A., India, Ireland, Mexico, New-Zealand, the United Kingdom. With a mixed structure; progress-oriented.

The International Context That Triggered This Study (Regnault, 2017)

At the Beginning of the Sixties

At the beginning of the sixties, major sociatal and educational changeshave taken place. The countries faced similar challenges and systems experienced a lack of solutions. The comparison of educational systems experienced a shift in paradigm, due to forces of globalisation. As it turned out, the global system become more and more influential. The post-war cultural expansion, supported by significant media structures (UNESCO, World Bank), led to an increasing interdependence of national educational systems (Schriewer, 1997). Priot to this period, international comparisons took place in a context of a scientific cooperation between independent research centres. Their gradual integration into inter-governmental structures modified the use of scientific cooperation, which became a political, educational and cultural cooperation. The OECD and the UNESCO have developed some international evaluation of educational systems from the 1960s onwards, in order to compare educational achievements.

Since the Year 2000

The cultural and educational interdependence has become more and more significant and social media has become more and more widespread. Yariv-Mashal (2006) states that 'the other is measured' by comparing countries using a same scale. 'I' and 'the other' are part of a same pattern. However, this integrative process can become a discriminative process, as the countries are ranked and therefore submitted to a hierarchy of the leagues table (Cowen, 1999).

In 1997, Debeauvais stated that, for international structures, comparisons were setting new objectives: instead of being mainly based on quantitative and descriptive data (number of pupils, spendings related to the teaching field, description of institutions, setting up of aims), the efficiency of educational systems – i.e. their adaptative ability and capacity to face new issues- was considered an economic

competitiveness and a social cohesion factor. This is why those structures today give greater prominence to evaluation. However, the UNESCO and the World Bank aren't alike (Debeauvais, 1997):

The UNESCO favours dialogues and interactions between national decision-makers, specifically during the State members' General Meetings (every two years), the world Conferences of the Education Ministers (every two years in Geneva in the IBE), the Regional Conferences. The UNESCO provides documents and experts' reports. The World Bank is also an inter-governmental structure with other constraints, since the importance of the governments is linked with their contribution; this differs from the principle that states « one country, one voice » which rules other international structures within the United Nations. Its North American management style implies that their importance towards the various governments depends on the loans granted by the World Bank, loans that are key in financing reforms in developing countries; the World Bank decides to grant loans that will be used in educational projects or other sectors;

The OECD (Organization for Economic Co-operation and Development) is an international structure we are specifically interested in as it assesses the educational systems in the world and is widely publicised. Even though education isn't part of its mission, it remains key thanks to the quality of its scientific papers and communications. It published its first study in 1992, entitled: '*Views on education*', which featured international educational indicators. Since then, this report has been published almost every year, with improved additions; the publications represent a unique gathering of data dealing with the transformation of educational systems in the OECD countries (Bottani, 2001). Answering a call from some governments and based on an international report, the OECD missions an international panel that proceeds to a detailed and comparative assessment of the topics. 800 researchers form the think-tank, mainly composed of economists, sociologists, several lawyers and researchers from other fields of expertise. The financial resources come from the contribution of the countries. Contrary to the UNESCO, the staff isn't recruited according to national distribution criteria. As such, the secretary is quite independent as regards political matters and is in a position to oppose a scientific approach to political strategies. The programme includes a part dedicated to education. For some years, the OECD has been analysing the links between education and work thanks to two groups: the educational Committee that represents the interests of mainstream political powers in charge of governing countries and the CERI (Centre for Educational Research and Innovation) which remains quite free to act since its field of expertise is based on innovation and research;

The IEA (International Association for the Evaluation of Education Achievement), an American research centre, had an influence over the OECD. Created in 1961, it was the first large-scale company that offered valuable quantified data in comparative studies. Husen and Postlethwaite are among its most famous names. The studies are: TIMSS (Trends in Mathematics and Science Survey) and PIRLS (Progress in Reading Literacy Survey).

The Current International Context

Since 1990, the educational and training world has tremendously changed in any developed country, giving birth to a new society: the society of knowledge (Petrella, 2001). This researcher has highlighted five key consequences triggered by these societal changes:

- Education dedicated to human resource, i.e. how education for and by a person has been driven out.
- Non-commercial education has become commercial education, i.e. how education was submitted to a market-driven economy.
- Education as a surviving tool in a time of global competition, i.e. how education has become a place where competition is taught instead of a cultural knowledge about life.
- Education serving technology, i.e. how technocracy took over.
- Education dedicated to equality, instead of education to equity.

The starting point was the taking into account of the idea of "human resources". A man is a resource that needs maintaining in order to make it more efficient at the service of the producing society. Dale (2005) states that the principle of the economy of knowledge is more and more widespread and influences the three aspects of the "national educational system". "System" refers to a changing process in the constitution of educational sectors, as parallels sectors sharing various responsibilities are developing on different scales. "National" refers to the complexity of managing education, the transition from governing to managing (see also Regnault, 2017).

From National to Local

Public educational policies are being widely discussed in the northern countries: the major role played by the State on the educational markets is challenged. One strong argument against this principle is that educational markets may lead the service providers to offer better quality services at better prices (Hanhart, 2002). The national frame isn't an educational policy standard any longer, as educational policies are organised through self-regulation and decisions made by the schools and the local authorities. Debates about centralisation-decentralisation, the criticising of the way the State acts or the fact that privatised teaching are but the visible face of the major crisis of the "school pattern" that strengthened in the 20th century. The expression "education-training", unavoidable today in the political vocabulary and international relationships, expresses the ongoing change. According to Rose (1999), education isn't limited to school any longer. The expression "education-training" is often completed by "life-long learning". The process unceasingly repeats itself and is everyone's responsibility, as the citizen is

"responsible" and "sensible", which means that he is well integrated in the working and consumption markets (Novoa, 2006).

Reporting to the User: The "New Public Management"

Keeping this view in mind, the suggestions about the reform of public management, named "the New Public Management" also apply to the educational systems and tend to strengthen the educational institutions. This increase in autonomy doesn't imply a loss of control from the public institutions as they are compelled to achieve some goals, which means that they must give account of the results and of the resources they are granted. Mons (2008) suggests that the user – be he the parent or the pupil – who for years was denied the right to be part of decision-making processes, has become all important in the theory of a social change that derives some of its aspects from the "New Public Management" trend: the results of the public service he took part in must be presented to the final user, who then arbitrates the upcoming political decisions. In 2001, Tiana had observed that the citizens were already asking to be more informed about the situation of the educational systems and the results it had effectively achieved.

The State reforms can be synthetised as a set of beliefs (De Grauwe, 2010):

- The schools achieve better results when they are granted more autonomy,
- The State must focus on the regulation and the assessment of numerous service providers and shouldn't issue offers on a direct basis,
- The responsibility towards the "clients" must complete, or even supersede, the responsibility towards the hierarchy,
- The choice and competition among providers will produce a higher quality and an increased efficiency.

The Public Show Society

The media more and more shape politics, mainly through a permanent assessment of public opinion. It could be defined as a "democracy of the moment" which is also "an emergency system". As a matter of fact, such politics are set up and managed through an overexposure of opinion polls and indicators, statistics and indexes in the media. Mirrors are in excess, that reflect several images at the same time, though in fact elaborating a same principle. Hagenbüchle (2001) suggests that the high visibility of political life has led to a public show and acknowledges that the chances of having a constructive debate are thus limited. Such a show gets more and more organised in an international space and thanks to a comparative logic. The constant comparison of "international data" "inevitably" leads to a common vision and "non-negotiable" solutions (Yariv-Mashal, 2006).

The Current Systems of Assessment on the International Level

Mutual Accountability

Scales and international indicators set up mutual accountability that requires from every country, every citizen, to be compared with others. We never mention such words as "homogenisation" or "uniformization", which are no longer accepted in the experts' speech. We now speak of "dialogue", "system understanding", "transfer", "communication opportunity". Comparison is now a "method of governance", a concept that is more and more referred to in the political and scientific environments. Logically, this word is defined by correlated words: contractual culture, partnerships, flexible adjustment, flexible framework, "benchmarking", open processes etc. (Sisson & Marginson, 2001).

Standardised Assessment

According to Mons and Pons (2009), standardised assessment is no new method in the educational systems of developed countries. While, in the past, a standardised assessment based on the measurement of learning processes mainly focused on the pupils, nowadays its span of action is much wider and connects pedagogy – its usual ground – to politics as it is now one of its managing tools. These systems now comply with the new orientations set up in the educational policies which have been developed in the OECD countries since the 1980s (Mons, 2007). We can better understand standardised assessment if it is connected to four recent evolutions in the educational systems:

- Based on a quantitative assessment of the learning processes and on the priority given to cognitive goals rather than to social goals in a broad sense (Osborn, 2007), linked to the development of the concept of competences as economically defined in the theory of human capital, taking into account the idea of "human resources". The human being is a resource that needs to be sustained so that it becomes more efficient in order to serve the productive society (Petrella, 2001).
- The development of a new form of social control of the teachers and of the schools by the administrative educational staff (districts, towns, deconcentrated structures, regions, according to the countries), very often part of reforms about decentralisation and school autonomy (Maroy, 2008).
- The change in the distribution of powers among central or federal decision-makers and the local authority supervisors, whose span of action is now extremely controlled (Broadfoot, 2000).
- The increase in the accountability of the School towards the public sector, in general, and the parents in particular, as part of new relationships among the

political world, the State, the administration, on the one hand, and the citizens, on the other hand; these new relationships depend on the emerging of the "democracy of the public sector", in which common property isn't placed under the supervision of the official managers any longer.

Efficacy, Efficiency, Equity

According to Charlot (2008), those words are based on a speech about control and transparency: to know it all, to control it all, to anticipate it all. This implies that innovation is a progress in itself. The Foucauldian panoptic (1975) is still accurate today as regards the educational field, in the way it analyses the jail system which highlights the presence of a feeling of an invisible omniscience in the prisoners.

As education is considered a key factor of competition for the nations, the development of a culture of assessment and the spreading of information have favoured the efficiency of national educational systems, which have gradually shaped education so that it has become a cross-border trade in education (Loomis et al., 2008). As they are linked to the public debts of the nation-States that are immersed in a global economy, the educational and training policies have progressively moved out from the local or national context that more and more depend on global economy (Bottery, 1994).

The Comparison Used as a Means of Governance: Good Practices, Benchmarking and Categorising. Surveys About the Results Obtained by Educational Systems

Good Practices

These practices have proved how efficient they are in some specific situations in a country and they set examples as patterns that apply in quite similar situations in another country. Therefore, as good examples, they are meant to be replicated. However, the implementation of these practices in a global context raises a question: what is the part played by culture, economy and social issues in the successes or failures of such practices? Are these practices the best, for whom and according to which patterns? Who sets the criteria, on which grounds? (Abdoulaye, 2003).

Benchmarking

This word implies differentiation or competitive calibration. This marketing technique or quality management consists in studying and analysing management techniques, organisational patterns of other companies in order to be inspired and

to yield the highest profit. For instance, the European Union resorts to this technique in the 2000 Lisbon Strategy. As a support in the "Open Method of Coordination", it measures national performances through statistics indicators, scorecards and rankings. The aim is to set out "good practices" that can be transferred to another context.

Ranking

Several ranking types can be listed:

- "Active" ranking that deals with classifying and sorting out a set of elements according to one or several pre-existing criteria (alphabetical order, size, colour, etc.).
- Ranking more precisely, i.e. a system better organised and structured according to hierarchical criteria;
- "Passive" ranking which means taking into account the result of a competition in a broad sense (after a race, a competitive exam, assessing the best sales, etc.). It is both the assessment of the strength of a competitor and the ensuing ranking (Rauhvargers, 2011).

The purpose of international surveys about the results of educational systems is to get to a simplified and understandable ranking, by the general public, in order to provide a guide to clear data and good practices for the user who will be able to choose what best suits him.

PISA

Since 2000, the PISA surveys (Program for International Student Assessment) have been conducted every three years by the OECD and deal with a sample of pupils aged 15, that is to say at the end of the compulsory education, in 72 countries of which 36 are members. The surveys were conducted in 2000, 2003, 2006, 2009, 2012, 2015 and 2018. The teachers are involved. The next survey will take place in 2021.

According to Schleicher (2019, 11), "*contrary to many national and international assessments, PISA doesn't aim at assessing whether the pupils are able to reproduce what they were taught at school. PISA assesses their skills and ability to go beyond what they have learnt at school in order to solve the problems they may face in daily life*".

PISA also investigates the satisfaction pupils feel towards life, their relations with their peers, their teachers and their parents and their school activities.

These assessments are analysed and interpreted; this data processing produces the country ranking and thus, the comparison of school achievements. Reconsiderations are under way. The States that reached the weakest results are going to improve their systems by taking elements from patterns and pedagogies from the best ranked

countries. The OECD is issuing "good practices" that are becoming international standards.

To be precise about the PISA survey, let's specify that these assessments occur in a period of transition for the pupils who are then invited to get out of the educational system to enter a career path; they aim at assessing the Reading Literacy, the ability to understand, to use and to analyse written documents, and to think about their meaning to play an active part in the society. The different types of documents to take into account are "continuous" texts (descriptive, narrative, informative, argumentative and injunctive) and the "non continuous" texts (forms, graphs, maps, etc.) In the former assessment, sciences were key and the goal was to assess if the pupils are able to use their abilities and knowledge rather than the ability to gain knowledge. The aim is to acquire skills – to the extent that the ability to perform a task or to think are considered more important than simply acquiring their knowledge.

Finland Results and Educational Politics Since the 2000s

History and Reforms

The Finnish educational system follows the Bottom Up logic, which is an ascending and decentralised approach of educational policies compared with the Top Down logic, which is a descending and centralised approach of educational policies, France illustrating this latter approach (Charlier & Pierrard, 2001). Contrary to France, Finland, as an independent country, is very « young » as it has just celebrated 100 years in 2017 As such, and even though it is independent, it went through the torments of the second world war and the political choices of the time, which generated:

- An educational system based on the German system with an early orientation and separate sectors, until the early 1990s.
- A still strong influence of Sweden that, after the second world war, imposed the learning of the Swedish language - the official language in Finland.

Contrary to France, less reforms have been implemented in the Finnish educational system. Rather than reforms, major trends have been the norm:[1]

- 1970: end of the « unique junior high school »; primary and junior high schools become a unique school. Orientation takes place at the age of 16. The teachers are educated at the university.
- 1990: the government announces the beginning of the reform, supported by local authorities and the teachers (decentralisation), with positive effects on the

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[1] Greatings to our collegues in Finland: Irmelí Halinen, Head of Curriculum Development, Finnish National Agency of Education; Raimo Alaarratika, Arts teacher; Vesa Raasumaa, Principal, Sammonlahden Koulu, Lappeenranta.

reducing of social inequities. From a pedagogical point of view, the number of teaching hours has been nationally set and the pupils are no longer selected according to their abilities: the concept of competence appears. The teachers and the teaching institutions are no longer assessed: trust develops, comparisons and competition among the teaching institutions gradually fade out.

- Beginning of the 2000s: the basic school that includes primary and high school teachings becomes one and sets up a common base.
- 2012: the orientations of the « new reform » are determined (2016–2020), that define the end of the common base and prioritise an interdisciplinary teaching. Local authorities define their priorities along with national priorities.

The reforms stem from a collaboration among the government, the educational system trade unions and employers, local and regional actors.

Like in France, the State sets up a frame concerning the national curriculum that will be enforced on the whole territory. Contrary to France, once the frame is set, the implementation of the curricula is currently under the local and regional actors' responsibility. If the favourable factors and parameters can be activated thanks to the teachers' training, the assessment of the school, an active involvement from the local partners and the staff's representatives, all agree on considering education of a paramount importance for the country. The decentralisation process, which started in 1990 and is accompanied by a public consultation that takes place every 5 years, requires a commitment from the local and national partners such are local authorities' employers (KT) and teachers' trade unions (OAJ).

This system has been assessed through the PISA and PIRLS tests. Since 2000, Finland has repeatedly ranked first but Asian countries are currently in a better position, among which are Singapore, China and Korea. However, it remains the first in Europe. It is to be noted that, contrary to countries like France, Finland hasn't planned its educational policy according to the test results but was surprised by the impact of its educational policy orientations over its results.

The Financing of the Finnish Educational System

The indicators provided by the OECD grant access to the data of numerous countries, educational matters included, which offer immediate opportunities to highlight some significant figures. The costs per pupil according to his/her educational level are expressed in PPS (Purchasing Power Standard), i.e. in a shared currency that sweeps away price level discrepancies among countries and that allows meaningful comparisons of GDP in volume among countries. In order to allow such comparisons, the educational cycles in primary and junior high schools regarding Finland have been separated.

From the OECD database (actualised on October 28th, 2019), the financed cost per pupil according to his/her educational level for the two countries is différent. If the cost per pupil in France increases tremendously in the same amount as it does at

the educational level, the same doesn't apply in Finland. Because grade repetition doesn't exist in Finland and seldom applies in France, they won't significantly alter the provided data and they show that Finland spends most of its educational budget in primary and secondary schools until the high school level. In these two fields, this country goes well beyond the OECD and EU averages. The emphasis is then specifically put on the fundamental learning stages. Access to education for all is one of the core educational principles in Finland. Education is free, including books, transports, canteen; university is free as well (books excepted).

A Specific Management

The specificity that consists in including local partners in the educational system is also noticeable in the financing of the educational system in which the State and local authorities are taking part. The State grants a fixed part of the budget and adds an adjustable one that enables a free educational system and a financial participation in some specialised teaching hours. Local authorities set priority areas from which the money collected by the State is reinvested in teaching hours according to local goals.

The Organisation of the Current System

In Finland, school before the age of 7 is possible though not compulsory. The cycle from the age of 7 to 16 refers to the "basic" school system that includes primary school and the equivalent of junior high school as from 1970 and that defines compulsory schooling.

This cycle is followed by national curricula similar to the French ones and in many countries, characterised by what corresponds to 3 high school years, completed by a university cycle in three parts: Bachelor in 3 years, Master in 2 years and finally PhD.

The Main Axis of the Educational System: Basic Education

The country's specificities play a key role in the general organisation of the educational system, at least as refers to this "Basic school" cycle: the wide geographical span, the low density of the population and the tough climate lead to the concentration of all kinds of activities in selected sites; local authorities can then fully participate in educational matters. The school system is, per se, a real living space where everyone plays an active part, including in the technical and material organisation. The concept of "School life" and its related job positions (educational advising, control) don't exist, as the teachers are required to perform these tasks in the whole structure (classrooms, corridors, inside/outside common spaces, canteen included). However, trust being key in the Finnish educational system, they seldom

interfere, even in class where lecture course isn't the rule, making the pupil the main actor in his/her learning process.

On the Teachers' Side

Contrary to France, a very large majority of teachers belongs to the OAJ (almost 90%) and the nature of the trade union differs from the French one. If the OAJ also fights for the teachers' rights, it is independent from a political party and it started from both a will to reach solidarity in cooperation and from a genuine desire to share a practical expertise in pedagogy. This last point makes it a privileged partner in negotiations and talks during the writing of educational laws of orientation.

Enjoying shared pedagogical methods and adjusting its educational policy in experimentations that are meant to take place in the classroom, Finland purposefully chooses to rely on the teachers as leaders to bring the educational system to success. Initial education and vocational training are then promoted.

There are two types of teachers in Finland: the "class teachers" who deal with general schooling, and the "subject teachers" who deliver a specialised teaching. If most "class teachers" teach until the 6th year, they also accompany until the 9th year. The teachers are trained at the university where they get a Master 2 degree; the "class teachers" get a general training based on various subjects whereas the "subject teachers" are taught their own field of expertise. However, child psychology is one of the main subjects.

Throughout their career, the teachers take part in the system of assessment of their school and they benefit from a constant adaptative training, which is strengthened and adjusted according to the results they have achieved following an assessment that can last one year. The teachers are encouraged to conduct some experimentations in their class, which will also be useful in the setting up of the five-year period consultation.

Finally, even if the teachers also fulfil a large part of the duties that refer to school life, their teaching time differs according to the subject they are teaching and not according to their job qualification. For instance, a maths teacher will teach 24 lessons a week (45 mn), whereas a teacher of Finnish will teach only 16 lessons. Such a difference comes from the fact that the teacher of Finnish will spend more time marking copies, and not in the presence of the pupils.

Even if this system doesn't contradict a more academic system such as the French one, the way it operates differs a lot and the differences between both systems is huge. The emphasis is put on a skill-based assessment; the pupil actively participates in the building of his/her own curriculum in order to validate his/her skills. However, this system may question the level of general culture: a pupil may "avoid" arts even if they are fully part of the French curriculum system until the end of the junior high school years.

How relevant is it to place those two countries on the same scale, as PISA does? To which extent is such a comparison possible? Aren't those surveys - initially based on research tools - a political tool that, above all, aims at conducting reforms?

The Most Recent Reforms

The latest reform of the system which covers the years 2016–2020 is about teaching from the primary to the university levels, vocational training for adults included. Each level consists of two distinct and complementary parts: national and local. If "local" integration is encouraged in France by texts promoting partnerships that don't often materialise, it isn't the same in Finland where national and local are balanced as regards the implementation of the reform and represent the main reason for it, for any teaching level. "Reform" thus means the simultaneous taking into account of educational aims in a broad sense, national and local.

The beginning of this reform and its implementation were progressive; they started with the consultations and the publishing of the 2012 national curriculum. Further on, the design and the implementation of this reform takes place in the wholeness of the educational system of the 7–16 years old, which seems to show that the split between "primary" and "secondary" teachings doesn't exist; this allows some homogeneity and a better individual follow-up of the schooling.

The integration of this new national part of the reform started with the internet consultation of educational partners, in order to:

- define the main trends at the end of 2012;
- study and decide about primary schools in September 2013 ;
- study and decide about secondary education in April 2014.

In parallel, the introduction of local curricula was studied, that led to their implementation in September 2016 according to the national curriculum, so that the reform was implemented in totality.

Encouraging a Better Integration into the Current World

The Finnish system seems to be a flexible system that aims at adjusting to the demands of a new world, either as a trend towards globalisation or as a loss in the quality of life. This reform is meant to produce citizens owing skills that require the integration into the current world (TICE, among others) and the need to live and build a sustainable future: its aim is to educate acting pupils so that they become acting citizens. The curriculum and the pedagogy have been reviewed in order to reach these goals. They are based on the 3 pillars of sustainable development: Economy, Environment and Social. The number of lessons has been increased (from levels 1 to 9), adding for instance sports or social sciences. The subjects qualified as "environmental" have been integrated into the educational cycle from levels 1 to 6, such as biology, geography, physics-chemistry or health sciences. Finally, the State grants a financial support to the towns that, in addition commit themselves to providing foreign language lessons.

The Part Played by the National Level

Every level starts with the "national" implementation (National Core Curriculum – NCC) followed by the "local" part of the reform. The NCC details the aims and basis of the "basic" education (basic school), including the transversal skills to be integrated.

The Part Played by the Local, from a Pedagogical Point of View

As part of a genuine intention of decentralisation, the State has transferred some competences to some local services in the towns for the teaching of students belonging to the basic school cycle.

In order to illustrate this decision that takes place at a local level, a town named Lappeeranta (South Karelia) has chosen to dedicate its political town orientation to the "Green Reality" (a sustainable development initiative based on the themes designed by the UNO). This scheme is a true political ambition, in the strict sense of the term: the citizens commit themselves to the collective project and all the shops, industries (educational institutions including universities, transports, town halls, hospitals, etc.) are actors in this scheme. This shows a common will to achieve a goal as well as an interdependence of the actors. Such an interdependence means that the educational institutions are compelled to connect, not only to outside partners but also, on a vertical axis, to pre-primary classes until the university (that also integrate pupils during collective activities); this gives meaning to what is taught.

The Results Achieved by France and the Educational Politics Since the Years 2000

History and Reforms

The French educational system has been structured according to the Top Down system (Charlier & Pierrard, 2001), a descending order, a centralised approach of educational politics compared with the Bottom Down system, ascending, i.e. a decentralised approach of educational politics which is the situation in Finland. It deals with a school-sanctuary, a separated space that needs to be protected by fences or walls. It is separated from the usual living spaces. The child separates from his/her family and community ties, in order to become a pupil (Pachod, 2019).

On the historical level, the educational system was based on the German system, with an early orientation and separated branches until 1975, when the single junior high school was created, which is still in place today. The structure is divided between the elementary school and the first lower secondary school. The core

curriculum is complete in this cycle. The junior high school pupils study a common curriculum that ends with a final exam, called "Brevet des collèges". The orientation takes place at the end of the junior high school years, at the age of 15 or 16.

France, which ranks 7 among the main world economic powers reaches a 495 result in PISA 2015, barely above the OECD average which is 493, and ranks 27. France hasn't progressed since 2000. In 2018, France ranked 23 out of 79 countries. The results are stalling and the educational inequalities linked to social classes are still present. The Ministry assumes that the reforms concerning elementary schools, allowing half class groups, will produce results when these pupils enter the junior high school.

Processing the answers to the questionnaires has led to the conclusion that the French system achieves mediocre results as regards reading, writing, oral communication and that it provides a material that doesn't always fit with the pupils' profile. French pupils are less able to deal with a literary text compared with other countries; therefore, it is advisable to focus on the language studied in class, be it oral or written, and to reconsider the teachers' education by developing their practical training.

The very average quality results achieved in the PISA assessments, as shown by the level of the pupils, may reflect inefficient pedagogical practices, as the pupils learn and integrate the knowledge transmitted by the teachers and don't deal with a competency-based approach.

The very average quality results achieved by France in the PISA assessments reflect social inequalities: social origins play an important part in the success in the studies. For instance, a pupil who comes from a disadvantaged background is less likely to be successful in his/her studies, compared with a pupil who comes from a more privileged environment. This observation also applies to the school institution, which will be granted less means to the extent that is depends on an underprivileged environment. Disruptions and a lack of equity remain as far as education in concerned.

In France, the socio-economic background has more impact than in the other OECDE countries (20 % in France versus 13 % in average in the OECD countries), and 40 % of the pupils coming from an underprivileged background have difficulties (34 % in average in the OECD countries. Schleicher (2019) points out that the institutions located in zones where education requires specific attention, seldom enjoy the best teachers and are run by heads of school with limited powers and who don't get sufficient support. A higher turnover is also specific to those institutions and some of them are experiencing important difficulties in making lasting and reliable contacts with the families.

Here Are the Details of the Reforms, from 2010 Onwards, That Are Linked to PISA Results

2010: Fight Against Illiteracy as Early as in the Kindergarten Years

Following the PISA 2009 results, another lever for action consists in focusing on basing learning, helping the pupils as early as possible and fighting against illiteracy

as early as in the kindergarten years. In the primary school curriculum, strengthening what has been learnt is key: repetition, recitation of operating tables and verb conjugations specifically, so as to produce automatic response as well as prioritising reading aloud by the teacher and the pupils. As a consequence, most of the educational accompaniment dedicated to the acquisition of basic knowledge will have to be reinforced.

2011: The New Political Priority: The ÉCLAIR System and the Internats d'Excellence Boarding Schools

Following the PISA 2009 results, and according to the ministry, one of the levers for action consists in encouraging the autonomy of the school institutions, customising the resources and developing experimentations, diversifying the access to excellence by readjusting priority education, in opening Internats d'Excellence boarding schools and in implementing the ÉCLAIR system (schools, junior high schools and high schools for Ambition, Innovation and Success). The aims of this priority education programme are as follows:

- To improve the studying atmosphere and to encourage everyone to succeed.
- To strengthen the teams' stability.
- To favour equal opportunities.

Such a programme offers innovations as regards pedagogy, school life and human resources to be implemented within every institution or school.

2013: The Reorganisation of the School

- The 2012 PISA results are weak, which, according to the National Education Minister, account for the reorganisation of the school and the necessity of reforms.
- France ranks 25 out of 65 countries. The following is observed: the gap is widening depending on the social level, the pupils who are weaker in maths develop anxiety towards the subject. The cumulative effects of these results aim at having the reforms accepted.

The system named: "more masters than classrooms" (National Education Official Bulletin, 2012) has pointed out the needs for more school masters so to implement new pedagogies such as differentiated pedagogy (Legrand, 1986, Minister of Youth and National Education, 2016). Annie Feyfant, from the French Institute of Education (IFE) offers a study and a full analysis of this orientation, of its definition, of its goals, of its complexity, of its practical implementation through case studies, always with the pupils' help in view (Feyfant, 2016). This pedagogy often takes into account the diversity of the pupils in their learning processes, which provides the key to the educational system and offers a personalised pedagogical support. Meyrieu provides

us with a reference to the Finnish model, that still ranks among the first in the PISA European results and that offers a balanced pedagogy as well as an example of pedagogical differentiation: every pupil and his/her difficulties are taken into account and dealt with individually, within an educational frame, that lets the children free to experiment rather than to be taught through a one-way and imposed transmission of knowledge.

The Peillon reform deals with academic paces, i.e. the transition to 4 days and a half instead of 4 days, including on Wednesday mornings and the end of classes at 3:30 in order to implement the NAP (New Pedagogical Activities), designed to offer cultural and sporting activities to children who can't enjoy them because of their social class. This reform should allow the pedagogical differentiation in the classrooms (Ministry of Youth and National Education, 2016). The reform and the teachers' education through the work-linked training during the second year of the Master. This reform aims at reinforcing the practical and pedagogical training of teachers on site. The former French system was consequence-logic based: the decision to integrate a teaching course and its practical training was made later on, after passing the Master 2 and the competitive exam. The simultaneous system combines theory and practice during the basic training years. The competitive exam takes place at the end of the Master 1, in the year 2013–2014. In their second Master year, the students become trainees as they receive a work-linked training and they are paid €1,600 a month.

2016: The Reform of the Junior High School

The reform enables the institutions to enjoy some independence. Its aim is that the junior high school allows the pupils to learn better in order to succeed better by mastering the fundamental knowledge and by developing the skills required in today's world. It grants more freedom in the management of the institutions thanks to interdisciplinary teachings, personalised accompaniment and work in groups (20% of the school time). The reform isn't financed on permanent funds but is based on the creation of 4,000 teaching positions.

In reaction to PISA 2009, in 2011, the Ministry of Education aims at making the institutions grow more autonomous (the ÉCLAIR system). It becomes "REP" (Priority Education Network) and REP+ in neighbourhoods experiencing the greatest social and school difficulties. The network involves a partnership between the school and the junior high school, which facilitates the distancing from the neighbourhood secluded area. The REP+ is granted 10% extra hours so to dedicate team working time for the teachers.

The 2015 junior high school reform grants independence to the institutions. The Minister of Education, Najet Vallaud-Belkacem, bases this reform on the results of the national and international assessments that she deems unquestionable. She observes that the junior high school deepens school difficulties. She bases her assumption on the PISA results and on the "Cèdre" (Cedar) studies conducted by the Ministry, that show an important decrease in the results over the decade, at the

end of the junior high school years, as regards written comprehension, maths or history-geography.

Since the 2018 and 2019 Beginning of the School Year, the Classroom Duplications in the First Grade and Second Grade of Preparatory Schooling

A maximum of twelve pupils per classroom, in the "REP" and REP+, and the system named "Homework Done": these systems are part of the prevention and fight against poverty strategies (Blanquer, 2018), based on the principle of equal opportunities. Jean-Michel Blanquer is the actual Minister of Education.

The scientific community becomes part of the High Council of School Curricula ("CSP"), probably influenced by the Singapore system, which has become number one in the PISA ranking (CNESCO, 2016). Blanquer, in his book untitled "The School of Tomorrow", suggests an approach through experience, science and international comparison. He recommends these three "pillars" to have an efficient school and remains convinced of the necessity of having some scientific knowledge in order to implement pedagogies. Thanks to the MRI progress, neurosciences have developed and have triggered scientific experiments in classrooms. Our children's brain is under scrutiny. The researchers are then developing softwares to support pedagogies for "another more egalitarian school". Learning has become the topic of scientific research.

2019: The School of Trust

Education is made compulsory from the age of 3 so to anchor knowledge as early as possible. Learning lasts until the age of 18. The NAP are suppressed since the parents strongly criticise them. The towns can either keep the teaching time to 4 days and a half or to come back to a 4-day teaching. A connection between the school and the junior high school is organised. The teachers' education will be more focused on practice with less university lectures. The inclusive school service is set up. The ESPE become INSPE (Upper National Institute of Teaching and Education).

Financing the French Educational System

As the search for efficiency, through the Accountability concept and the rationalisation of the educational system, is important, the evolution of the funding of the French educational system is shown here below.

It has gone through transformations or at least attempts as part of the numerous institutional reforms which are often triggered by international comparisons. These transformations raise questions we'll answer briefly.

The Evolution of the Fundings

Even before the decentralisation laws as regards school teaching, the State remains the main fund provider in education. If we look at international comparisons, the internal educational spending ("DIE") must be taken into account since all the educational system fund providers are part of it; this allows pupil's or student's cost calculations (Szymankiewicz, 2013).

According to international comparisons, France, with 6.7 % of the GDP (2018) – figures that have experienced a 1 % decrease in the span of 20 years – remains above the average of the OECD which records 5.9 %. As regards the pupil's or student's cost, the breakdown of the way the various educational categories are financed remains absolutely unusual (Cytermann, 2019). France is both the country where the difference between an elementary and secondary pupil's cost is the highest (about 20 % in the OECD countries compared with almost 90 % in France), and where the gap concerning the cost of a student and the cost of a high school pupil is the smallest.

The Impact of International Comparisons on the Performance of Educational Systems

Since the years 2000, France has been facing three international comparison phases: PIRLS about the reading skills of pupils aged 10, PISA about pupils' skills aged 15 and the Shanghai ranking of the best universities, which have led the country to question the educational system performance, including in higher education. Therefore, the question of the efficiency of educational spendings in France has been raised on a regular basis (Cytermann and Chevaillier, 2012). The same topic appears in the parliamentary reports about the budget of education, that show that the results remain in the average and even are on the downward trend, despite a decrease in the number of pupils and an increase in the number of teachers.

The analysis conducted by the OECD by comparing the PISA results and the means injected in the educational field, meet the conclusions of most educational economists (Cytermann, 2012): once a specific level of development has been reached, there is no correlation between the means invested in education and the results: France and Finland share the same amount of educational spendings but they achieve very different results. The same applies to the Czech Republic and the USA, with similar results but very different levels of educational investments.

A recent document from the OECD concludes that "among economically advanced countries, the amount of the educational spending is less important than the way the resources are used and the best systems of education favour the quality of the teachers".

As regards France, the results aren't correlated to parameters that measure the importance of the means: size of the classrooms or number of hours granted to the

pupils. Such an analysis has led to cost-saving measures impacting the educational budget from 2012 onwards.

The Limits of Funding According to Performance

Guillaume et al. (2002) think that no country has ever succeeded in linking performance to the granting of means. The explanation seems simple: when a goal hasn't been reached, it isn't often easy to detect its causes and thus to draw the consequences about the granting of means. Moreover, according the 2017 report of the Court of Auditors, funding the performance doesn't occur in the school teachings nor in the breakdown set up by the ministry among the academic institutions, neither in the breakdown set up by the rectors of the school institutions.

The Importance of the Way the Means Are Granted

Numerous analyses conclude that, beyond the question of global means of the educational system, the way those means are granted should be questioned as well as the important inequalities that remain between the school institutions and academies.

The well-known specificities of this educational system concerning the differences in the educational funding in the various educational institutions remain. Such specificities absolutely justify the priority granted to primary schooling, according to the law about the school system reorganisation.

The way the means are split also raises the question of equity. The recent reports of the Court of Auditors in 2010 and 2013 criticise the efficiency of the priority education policy, lamenting on the fact that the Ministry of Education spends twice as much in doubling a class than in priority education.

The Perspectives

Since 2012, the budget of Education has benefited from a priority treatment and has slightly progressed, thanks to substantial job creations that are part of the chart included in the law about the school system reorganisation (55,000 over five years). These job creations are mainly dedicated to ensuring a sound training to produce good teachers and to favouring primary education.

The Current System Organisation

Primary school include kindergarten and elementary schools. The children go to school at the age of 3. Kindergarten lasts 3 years (first, second, last section). The

school is free with national curricula. Elementary education lasts 5 years: preparatory, elementary 1st year, elementary 2nd year, fourth grade, fifth grade). Secondary education includes junior high school and high school. Junior high school lasts 4 years and all the pupils attend it. In the high school, the pupils have two options: general education, technological or vocational education. They end with the exam named "baccalauréat" (general, technological or vocational). The passing of the exam is compulsory in order to further enrol in higher education. Almost 88 % of the pupils passed the "baccalauréat" in 2019.

Higher education consists of Bachelor degree, general or professional, in 3 years. The Master degree requires 5 years and the PhD 8 years. The "baccalauréat" is necessary to study at the university. Simultaneously, the "IUT" (Institut Universitaire Technologique: Technological University Institute) and high schools teach to get the "BTS" (Brevet de Technicien Supérieur": Senior Technician Degree) and "CPGE" ("Cours de Préparation aux Grandes Ecoles": Preparatory Course to enter Higher Education Institutions); all of them last 2 years and select the students from their school file.

The teachers' training depends on National Education competitive exams following a work-linked training in Master 2. As regards the school of trust, the competitive exam takes place at the end of Master 2, at the beginning of the 2020 school year.

The training is organised according to subjects and fields. Interdisciplinarity is quite unusual in the educational system. The assessment is based on the curricula and quantitative grades are granted. France is gradually setting up a competence-based assessment by decreasing the amount of quantitative grades.

The Reforms of Lower Secondary Education

The Organisation of Junior High Schools

Junior high school teaching is structured in four levels and pedagogical cycles. Those cycles lead to assess the pupils' acquired skills and knowledge over a longer time and to implement a more efficient pedagogical support. Every pupil is taught 26 hours a week and can get a complementary optional teaching.

As regards the compulsory 26 teaching hours, the complementary teachings (practical and interdisciplinary – EPI (2015 reform) – and personal support – AP) amount to 3 hours in sixth grade (cycle 3) and to 4 hours in 5th, 4th, 3rd grades (cycle 4). The way the complementary teachings is organised is set up by the administrative board of the institution following the advice from the pedagogical council. Computer skills are assessed throughout the school years, from the age of 6.

The common core of knowledge, based on skills and culture (2016 junior high school reform) deals with what every pupil must know and master at the end of the compulsory school years. It includes all the knowledge, skills and attitudes required to succeed in the studies, personal life and future life as a citizen. The school textbook shows the parents their child's achievements and progress, in a full and

detailed assessment. The mastering of the common core of knowledge is required for the passing of the junior high school national degree ("DNB"). This degree, if, it hasn't been passed, doesn't prevent entering high school, assesses the knowledge and skills acquired at the end of the junior high school. It is balanced between the common core of knowledge assessment (continuous assessment) and the final exams. Every assessed subject is part of a specific assessment except in sciences (two subjects), and an oral assessment.

The pupils' orientation at the end of junior high school takes place as early as in the 6th grade and continues the following years thanks to the "Parcours Avenir" (Path to the Future) and through a continuous dialogue involving the pupils, the parents, the teachers, the educational advisers, the heads of the institutions and the psychologists from the National Education.

The Most Recent Reforms

The 2016 reform:

- The EPI, a collective and interdisciplinary work conducted by the teachers in small groups.
- The reinforcement of language teaching: the first foreign language in the preparatory course and the second foreign language in the fifth grade.
- Personalised accompaniment for all the pupils.
- A new common core of knowledge, skills and culture, the first one dating back to 2005.

Since 2017, the system "Homework done" offers to the willing pupils in junior high school an accompanied study time to do their homework. Helping pupils to do their homework – especially the weakest ones – enables them to succeed.

A reform of the French Certificate of General Education has been planned in 2021.

Similarities and Differences Between the Two Countries

The similarities are as follows:

Historically speaking, France and Finland have modified the way the pupils are oriented, i.e. from an orientation that took place at the end of the elementary school to an orientation that now takes place at the end of the high school years. In both countries, the orientation takes place at the age of 16.

The numerous differences are the following:

France depends on the Top Down system: national curricula, schools without autonomy, a highly regarded school that sets limits, the society must adjust itself to the school system, the child is separated from its former social groups: family,

culture, religion (such is the case for instance concerning laicism); an external partnership is constrained as it is somewhat considered a source of risks.

Finland depends on the Bottom Up system; the guidelines are adjusted according to the local conditions, schools don't set limits, the school system must be adapted to the society, the child isn't separated from its social groups such as family, culture, religion (thanks to an educational offer concerning mother tongues and religions), external partnerships are easy to set up as they are highly recommended.

The French structure is differentiated as it separates elementary schools from high schools, with a full common core in the first lower secondary school. The Finnish structure is undifferenciated without any separation between elementary and secondary education, and a full common core in the first lower secondary school as well.

France is academically centred on curricula with numerous assessments. Finland enjoys a progressive and constructivist approach, is child-development and know-how centred, with few graded assessments before the age of 11.

As regards the problems raised by PISA, French faces inequalities regarding school results that are triggered by socio-economic inequalities, and regularly ranks in the PISA lower average ranking. Finland isn't impacted by such social inequalities and still ranks well in PISA and is first among the European countries.

The reforms implemented in the wake of the PISA results don't influence the Finnish reforms, which fully follow the OECD recommendations.

France will set up numerous reforms, among which is individual support; it focuses on basic learning, implements an experience-based system and a problem-solving system. As part of the French vocational training, the teachers are trained according to the Singapore method. The independence of the school institutions is guaranteed through the ÉCLAIR system. A teachers' training reform is set up in France, together with a progressive and constructivist approach. Interdisciplinary teachings are developed thanks to the EPI in junior high schools; however, such a system was questioned in 2017. Since the beginning of the school years, in 2018 and 2019, class division has been implemented in the preparatory class and the second year of primary school. Education is now compulsory, following a 2019 decision about the "school of confidence", so to facilitate the transition towards elementary education and also to prevent religious separatism.

Conclusion: The Link Between the Seven Recommendations from the OECD and the Reforms

These recommendations come from the OECD surveys (Dumont, Instance et Benavides, 2010):

- To give the pupil the prominent place.
- To have a constructive approach of the learning process thanks to active teaching.
- To favour cooperative relationships among the pupils.
- To develop friendly and safe links between teachers and pupils.

- To understand the teacher's part as a guide, a facilitator.
- To produce positive assessments.
- To associate an interdisciplinary and a collaborative learning, with the mastering of the knowledge required in every subject.

Perspectives: Questions About the Junior High School Teachers: The Influence of Local Over Global

In the second part of the research dedicated to the glocalisation phenomenon that takes place at a local level, we will distribute a questionnaire to the teachers and will conduct some interviews with some teachers from different categories, identified after the processing of the questionnaires. Here are some of the questions:

- How teachers today can conduct complicated missions, as they are sometimes split, in their daily work, between the core values of their job and the call to rationalise their action, which affects the professional norms and makes their original mission more complex? How conscious are they of such calls for rationalisation?
- What knowledge do they have about international surveys? Do they draw a link between the results of these surveys and the reforms?
- How, in their class or their school, do teachers face the world changes? Which changes are taking place in their school institution?

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Chapter 4
Developing an Education Planning Tool to Create the Conditions for Social Justice in a Global Village

Sigamoney Naicker and Ambalika Dogra

Abstract This chapter argues that inequality seems to impact on virtually every society in the world. Schools seem to reproduce inequality and in some countries in the world poor communities have been reproduced for over more than a century. It calls for a more egalitarian society that is based on developing programmes that reduce inequality. The chapter confronts the issue of inequality facing most countries and calls for changing education systems since education can become an important catalyst for change. Most education systems have been captured by politics and global ideas of accumulating wealth whilst the policy remains irrelevant and useless to the poor. The chapter makes a case for a social justice model in education that influences every decision in terms of planning and operationalizing education. The chapter emphasizes the need for changing theoretical frameworks and practices that are committed to asking questions about what is best for developing the conditions for social justice. How can we plan and develop programmes that will ensure spending and planning is in the best interests of all sectors of society mainly the poor. Finally the chapter argues that the status quo should be ruptured in the interests of creating the conditions a just social order in terms of planning and implementing education policy.

Keywords Changing schools · Cultural reproduction · Education reforms · Globalization · Inequality · Social justice

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Developing an Education Planning Tool to Create the Conditions for Social Justice: Introduction

It has been well documented that education presents a unique opportunity to address the challenge of inequality (Apple, 2001; Klasen & Lamanna, 2009). Most systems of education have not made a serious attempt to address the challenge. Education systems in the world are less likely to address poverty in their own countries without the operational capability since producing policy documents is not the solution. Reports out of the most powerful nations in the world suggest that some communities have been reproduced for over a hundred years. The Black Lives Matter movement in the USA bears testimony to this point, (Maqbool, 2020). This chapter attempts to, (i) describe the problem and (ii) provide a resolution since it suggests that the centre of any Department of Education planning should be vulnerable children. John Rawls (1993) and Amartya Sen (2009) have written constructively about education and social justice. It is important that a social justice theory be applied to education. This chapter suggests that vulnerable children be brought to the centre of education planning particularly at the level of education departments that formulate and implement policy. There is a need to restructure organograms best suited to addressing the plight of growing poor communities and generate a narrative that forces them to ask the question how do we reduce inequality?

Rawls (1993) argued the following principles of justice:

(a) Each person has an equal right to a fully adequate scheme of equal basic liberties which is compatible with a similar scheme of liberties for all.
(b) Social and economic inequalities are to satisfy two conditions. First, they must be attached to offices and positions open to all under conditions of fair equality of opportunity; and second, they must be to the greatest benefit of the least advantaged members of society (Rawls, 1993, p. 5).

It is against this background that the chapter explains the contemporary problems facing society in terms of inequality and suggests structural change within education departments as well as a comprehensive narrative that forces education authorities to ask the question how can fairness be applied to education policy and practice?

Problem Defined

International data suggests that this is indeed a serious problem and it is growing. The crime and violence that confronts begins in the classrooms of schools. Children who are not well educated pose a serious threat to the stability of society. Inequality is growing for more than 70% of the global population, exacerbating the risks of divisions and hampering economic and social development. But the rise is far from inevitable and can be tackled at a national and international level, says a flagship study released by the UN on Tuesday, March 3 (UN News, 2021).

The World Social Report, 2020, published by the UN Department of Economic and Social Affairs (DESA), shows that income inequality has increased in most developed countries, and some middle-income countries - including China, which has the world's fastest growing economy. The challenges are underscored by UN chief António Guterres in the foreword, in which he states that the world is confronting "the harsh realities of a deeply unequal global landscape", in which economic woes, inequalities and job insecurity have led to mass protests in both developed and developing countries. "Income disparities and a lack of opportunities", he writes, "are creating a vicious cycle of inequality, frustration and discontent across generations." (Guterres, 2020).

The study shows that the richest one per cent of the population are the big winners in the changing global economy, increasing their share of income between 1990 and 2015, while at the other end of the scale, the bottom 40% earned less than a quarter of income in all countries surveyed. Three strategies for making countries more egalitarian are suggested in the report: the promotion of equal access to opportunities (through, for example, universal access to education); fiscal policies that include measures for social policies, such as unemployment and disability benefits; and legislation that tackles prejudice and discrimination, whilst promoting greater participation of disadvantaged groups.

While action at a national level is crucial, the report declares that "concerted, coordinated and multilateral action" is needed to tackle major challenges affecting inequality within and among countries.

Universal access to education is indeed a very important point of departure but education departments and teaching training should make vulnerable children the centre of their programmes. In most countries education policy is driven by politics, personalities and power with programmes largely reproducing the status quo. It is important that all countries both developed and developing recognize inequality as the single biggest threat to the stability of society. The world has never been as chaotic as it is now. This is reflected by various events in the world which include, for example, the instability in the United States, Middle East and in Africa. All these people have emerged from classrooms of the world and often inequality results in violent and aggressive behavior. The source is often economic although there are a number of other variables.

How Do Education Departments in Various Countries Respond to This Crisis?

Can education policy create the conditions for change and transformation as most policy documents promise to do or is it a type of symbolism that attempts to appease the public? This chapter attempts to answer this question given the lack of progress at an international level in areas such as removing inequalities and ensuring inclusive education. There is often much talk about neatly crafted policy documents that are

written and made reference to when questions are raised about challenges in practice as it relates to inequality. This chapter makes the point that much more work should be done concerning transformation than just preparing a policy document. At an international level 17 Sustainable goals have been developed and most countries are signatories to this policy initiative. After signing and agreeing to implementation limited structural changes take place regarding the organogram of the departments that implement, no budgetary change and little or no human resource development takes place. Since mass education began a hundred years ago little has changed for poor children and children who experience barrier to learning. Well written policy documents remain on the shelf whilst the status is reproduced over centuries. It is against this background the chapter makes reference to the policy process in the contemporary world and makes recommendations on what should be done in order to ensure new policy is given a good chance for implementation.

This chapter suggests that two interventions need to take place. On the one hand there has to be a reorganization of organograms of education departments. At the centre of the planning process, there should be an attempt to place the vulnerable learner at the centre. This should be emphasized in all developing countries. However, the United States and United Kingdom also experience serious challenges in terms of inequalities. Organograms should be designed to in such a way that their formation should be based on the inequality narrative and ask the questions, how do we reduce inequality in all its forms in education. Thus there has to be structural change. Budgets and human resource development should be aligned accordingly. This will ensure that at the centre of the planning process is the structures that will address underdevelopment and poverty in education. In terms of human resource development all key personnel who drive transformation and change should be exposed to a broader narrative on barriers to learning. This narrative should be the gaze of every public servant within an education department. The barriers to learning narrative is discussed in detail below and draws heavily from South Africa's education white paper 6 on special needs education building an inclusive education and training system (Department of Education (2000).

The Key Barriers to Learning and Development

Barriers can be located within the learner, within the centre of learning, within the education system and within the broader social, economic and political context. These barriers manifest themselves in different ways and only become obvious when learning breakdown occurs, when learners 'drop out' of the system or when the excluded become visible. Sometimes it is possible to identify permanent barriers in the learner or the system which can be addressed through enabling mechanisms and processes. However, barriers may also arise during the learning process and are seen as transitory in nature. These may require different interventions or strategies to prevent them from causing learning breakdown or excluding learners from the system. The key to preventing barriers from occurring is the effective monitoring

and meeting of the different needs among the learner population and within the system as a whole.

Socio-economic Barriers

The relationship between education provision and the socio-economic conditions in any society must be recognized. Effective learning is fundamentally influenced by the availability of educational resources to meet the needs of any society. In many countries, especially our own country, there are inadequate numbers of centers of learning and other facilities to meet the educational needs of the population. In most cases, inadequacies in provision are linked to other inequalities in the society such as urban/rural disparities, as well as inequalities arising from discrimination on grounds such as gender, race and disability. Barriers result not only from the inadequacy of provision, but also from policies and practices which are designed to perpetuate these inequalities.

Lack of Access to Basic Services

One of the most significant barriers to learning remains the inability of learners to access the educational provision that does exist and their inability to access other services which contribute to the learning process. In most instances the inability to access education provision results from inadequate or non-existent services and facilities which are key to participation in the learning process. For example, in many poor communities, particularly in our own country in rural areas, learners are unable to reach centres of learning because there are no transport facilities available to learners or the roads are so poorly developed and maintained that centers cannot be reached. While such barriers affect all learners in poorly serviced communities, it is important to recognize that particular groups of learners are more severely affected by these barriers. In general transport systems which do exist are inaccessible to learners with disabilities, particularly learners who use wheelchairs. So, for example, learners with disabilities who should be attending school or who wish to go to adult education classes are unable to even reach the school or class because the public transport system which is available is either physically inaccessible or unwilling to transport them. At the same time they are unable to walk to school or classes and in this way they are totally excluded from the education system.

  While inadequate transport remains a key element preventing access to education, other basic services such as access to clinics also impinge on the learning process. If a child has a chronic illness, for example, regular medical treatment which may be needed may result at best in learners experiencing periods of long absence from the classroom to reach treatment or at worst in learners 'dropping out' of school in order to be hospitalized in a facility where no provision exists for learning support to

continue during the period of treatment. Lack of early intervention facilities and services also means that many children, especially those with severe disabilities, are unable to receive the necessary intervention and stimulation which will equip them to participate effectively in the learning process. This barrier not only leads in many cases to increased impairment, but also to decreased capacity to learn, particularly in integrated settings.

Lack of access to other services, such as welfare and communication services, also affects the learning process and leads to learning breakdown or exclusion. The lack of Sign Language interpreters in public services mean that these facilities remain largely inaccessible to Deaf learners.

Poverty and Underdevelopment

Closely linked to the lack of access to basic services is the effect which sustained poverty has on learners, the learning process and the education system. For learners, the most obvious result of poverty, often caused by unemployment and other economic inequalities, is the inability of families to meet basic needs such as nutrition and shelter. Learners living under such conditions are subject to increased emotional stress which adversely affects learning and development. Additionally, under-nourishment leads to a lack of concentration and a range of other symptoms which affect the ability of the learner to engage effectively in the learning process.

Poverty-stricken communities are also poorly resourced communities which are frequently characterised by limited educational facilities, large classes with high pupil/teacher ratios, inadequately trained staff and inadequate teaching and learning materials. Such factors raise the likelihood of learning breakdown and the inability of the system to sustain effective teaching and learning. Learners from families where one or more of the breadwinners are unemployed or poorly paid are also more likely to leave school as soon as possible to go out to work to supplement the family income. This perpetuates the cycle of limited skills with fewer work opportunities, increased likelihood of unemployment or poorly paid work and, thus, ongoing poverty and exclusion.

In considering the effects of poverty on the learning process and access to education, it is also important to recognize the link between poverty and disability. People with disabilities are often those most easily excluded from the education system and from the labour market and are therefore the most poverty stricken in any population. Related to these realities is the perception in many families who have a child with disabilities such a child is unlikely to be employed or to be in a position to contribute to the family income. At best, the child is kept back from school until his/her more able-bodied siblings have been accommodated or at worst, is never given the opportunity to go to school or to learn. This has, for example, resulted in an affirmative funding approach in Uganda where families with four children receive free education with the proviso that preference is given to the sibling with disabilities.

Factors Which Place Learners at Risk

Effective learning is directly related to and dependent on the social and emotional well-being of the learner. It is important to recognize that particular conditions may arise within the social, economic and political environment in which the learner lives which impact negatively on the learner's social and emotional well-being, thus placing the learner at risk of learning breakdown. Such factors either impact directly on the learner or on his/her family or community. In all cases the learner's emotional and social well-being and development are threatened.

A child who is physically, emotionally or sexually abused is not only emotionally and physically damaged but such abuse may also lead to the learner being forced to miss school and eventually to 'drop out' of the system. Factors such as substance abuse may affect the learner or may affect the learner's family, causing family breakdown and increased stress. Problems in families and abuse may also cause children to leave home and live on the streets. For young girls who fall pregnant while still at school, effective learning breaks down when the economic implications of having a child force the learner to leave to go out and work to earn money. The associated stigmatization and the lack of a supportive infrastructure for learning and teaching mitigates against being able to continue attending school and thus engage in the learning process.

Sometimes learners are placed at risk by conditions arising in the wider society. In many countries, our own being a case in point, young learners have been subjected to civil war and other forms of political violence which not only disrupt the learning environment but also lead to trauma and emotional distress. High levels of mobility of families resulting from processes such as urbanisation, the establishment of informal settlements, eviction of farm workers and families being forced to seek refugee status in safer environments also lead to disruption of the learning process and, ultimately, to learning breakdown.

The nature of the centre of learning and its ability to provide a conducive teaching and learning environment is undermined when the surrounding environment is made unsafe by high levels of violence and crime. When the safety of educators and learners cannot be guaranteed learners may be prevented from participating in effective teaching and learning or these may be disrupted. In this way lack of safety in the learning environment becomes a barrier to learning and development. A lack of provision of basic amenities at centers of learning such as electricity and toilets creates an unhealthy environment which undermines learning and teaching and places learners at risk.

In recognizing and identifying those factors within the broader environment which place learners at risk, it is important to recognize that problems such as natural disasters or epidemics which arise in any society have a significant impact on learners. For example, over the last decade more and more children and adults have been affected by the HIV/AIDS epidemic. Many learners have not only had to deal with chronic illnesses resulting from the disease, but have also had to deal with the loss of family members, particularly breadwinners.

It is obvious from the above that the impact of socio-economic barriers is more severe for those learners who are already excluded or marginalized in the society. Learners with disabilities, learners living in poor communities, learners discriminated against on the basis of gender, race, culture or other characteristics which are used to marginalize people are often subjected to a range of these barriers, such as the compounded nature of various forms of discrimination, thus rendering them even more vulnerable and likely to be excluded or experience learning breakdown. It is also important to recognize that learning breakdown can perpetuate further breakdown, often manifesting itself in disruptive and self-destructive behaviour by the learner which also negatively affects other learners. In recognizing the impact of a variety of barriers on learners and the system it follows that overcoming and preventing these barriers must involve a range of mechanisms which recognize the needs of the learner and the needs in the society which must be met.

Attitudes

Negative and harmful attitudes towards difference in our society remain a critical barrier to learning and development. Discriminatory attitudes resulting from prejudice against people on the basis of race, class, gender, culture, disability, religion, ability, sexual preference and other characteristics manifest themselves as barriers to learning when such attitudes are directed towards learners in the education system.

For the most part, negative attitudes toward different learners manifest themselves in the labelling of learners. Sometimes these labels are just negative associations between the learner and the system such as 'drop outs', 'repeaters' or 'slow learners'. While it is important to recognize the impact which this kind of labelling has on the learner's self-esteem the most serious consequence of such labelling results when it is linked to placement or exclusion. Sometimes learners are placed in a particular learning environment merely because they are labelled as belonging to a category of learners for which a particular kind of educational placement exists. Because the placement has occurred through the attachment of a label rather than through an appropriate assessment of the educational needs of the learner or what is required by the system to meet those needs, the placement may not only be inappropriate to the learner's needs but it may also result in the learner being marginalized. This also perpetuates the failure of the system to change or adapt to meet such needs. Learners with disabilities have often been placed in specialized learning contexts merely because they were labelled as disabled. The particular nature of their disability, the particular educational needs arising from such a disability, such as a necessary assistive device, or other needs within the system, such as physical accessibility, are not properly considered. Labelling goes so far as to sometimes categorize learners, particularly those with severe mental disabilities, as being 'ineducable'. Such a label fails to consider what is needed from the system in order to meet that learner's needs, whatever their capabilities and capacity.

Sometimes negative attitudes and labelling result from fear and a lack of awareness about the particular needs of learners or the potential barriers which they may face. Children who are HIV+ have been excluded from attending school with other children because of the negative assumptions and misconceptions associated with the disease. Because of poor knowledge of the disease and its transmission, these children, by merely attending school with other children, are seen to be placing other children at risk of infection.

Barriers resulting from fear and lack of awareness may arise from the feelings of parents or educators themselves. For example, learners with high ability are often regarded as a threat and therefore face denial of their significant abilities.

For learners with disabilities, fear and lack of awareness about disability among some parents and educators remain a significant barrier to their learning and development. Such barriers may arise when the child is born. Many parents have difficulty in accepting a child with a disability. In a patriarchal society the mother is often blamed for the disability and fathers deny responsibility for the child. The isolation and marginalisation of the child is exacerbated when and if they are able to enter into the education system. Very often teachers fear the inclusion of a child with a disability in their class and respond negatively to their attendance. Negative attitudes towards disability are picked up by the other children who further alienate the disabled learner. Many of the negative attitudes towards disability result from some traditional and religious beliefs which denigrate disability.

Inflexible Curriculum

One of the most serious barriers to learning and development can be found within the curriculum itself and relates primarily to the inflexible nature of the curriculum which prevents it from meeting diverse needs among learners. When learners are unable to access the curriculum, learning breakdown occurs. The nature of the curriculum at all phases of education involves a number of components which are all critical in facilitating or undermining effective learning. Key components of the curriculum include the style and tempo of teaching and learning, what is taught, the way the classroom is managed and organized, as well as materials and equipment which are used in the learning and teaching process.

Sometimes educators, often through inadequate training, use teaching styles which may not meet the needs of some of the learners. An educator may teach at a pace which only accommodates learners who learn very quickly. Alternatively, the pace and style of teaching may limit the initiative and involvement of learners with high levels of ability. What is taught or the subjects which learners are able to choose may limit the learner's knowledge base or fail to develop the intellectual and emotional capacities of the learner. Such barriers arise when sufficient attention is not given to balancing skills which prepare learners for work (vocational skills) and skills which prepare the learner for coping with life (life skills). Some learners are excluded from certain aspects of the curriculum as a result of ignorance or prejudice.

For example, learners with physical disabilities are often prevented from playing sport or are not given the opportunity to do so. Similarly, male and female learners are encouraged or pressured to take certain subjects at school or at tertiary level according to their gender because those subjects will equip them for jobs which stereotypically are undertaken by men or women. What is taught through the curriculum may often be inappropriate to the learner's life situation making learning extremely difficult and ultimately contributing to learning breakdown. For example, adults involved in literacy training may be taught with the use of examples which are unrelated to their particular life experience. Materials used for teaching and learning which constantly reflect only one culture or life experience, may lead to learners from other cultures and life experiences feeling excluded and marginalized.

One of the most serious ways in which learners are prevented from accessing the curriculum is through inadequate provision of materials or equipment they may need for learning to take place. Such barriers often affect learners with disabilities who do not receive the necessary assistive devices which would equip them to participate in the learning process. For example, blind learners are unable to access the curriculum effectively if appropriate Braille facilities and equipment are not available and if teachers are not skilled to teach Braille or use audio equipment. Lack of provision of assistive devices for learners who require them may impair not only the learning process but also their functional independence, preventing them from interacting with other learners and participating independently in the learning environment.

The ability of the curriculum to lead to learning breakdown also occurs through the mechanisms which are used to assess learning outcomes. Assessment processes are often inflexible and designed to only assess particular kinds of knowledge and aspects of learning, such as the amount of information that can be memorized rather than the learner's understanding of the concepts involved. The seriousness of such barriers is most obvious where there are large number of learners who are forced to repeat aspects of the curriculum, even if this means remaining in levels where the age gap between the learner and the other learners is significant.

Language and Communication

A further area of barriers arising from the curriculum, are those which result from the medium of teaching and learning. Teaching and learning for many learners takes place through a language which is not their first language. This not only places these learners at a disadvantage, but it also leads to linguistic difficulties which contribute to learning breakdown. Second language learners are often subjected to low expectations, discrimination and lack of cultural peers. Educators furthermore often experience difficulties in developing appropriate support mechanisms for second language learners.

Such barriers can be particularly destructive for Deaf learners whose first language is Sign Language. Misperceptions with regards to the morphological, syntactic, discourse, pragmatic, 'phonological' and semantic structures of Sign Language,

which are entirely equal in complexity and richness to that which is found in any spoken language, often lead to Deaf learners being forced into learning through the so-called 'oral' method, or having to learn through signed spoken languages (for example, signed English or Tswana, or signed exact English or Tswana. Being able to access Sign Language as the medium of teaching and learning enables these learners to develop bi- and multi-lingualism through Sign Language as the medium of teaching and learning.

Communication is essential for learning and development in both formal and informal contexts. Learners who are non-speaking due to the severity of their physical, intellectual and/or mental disability experience enormous barriers to learning and development. These barriers arise from the general unavailability of augmentative and alternative communication (AAC) strategies to enable them to engage in the learning process, and more often than not find themselves totally excluded from learning and development experiences. AAC systems could consist of alternative communications systems, supplements to vocal communication and communication through facilitators.

Inaccessible and Unsafe Built Environment

In many contexts the vast majority of centers of learning are physically inaccessible to a large number of learners, educators and communities. Inaccessibility is particularly evident where centers are physically inaccessible to learners, educators and members of the community with disabilities who use wheelchairs or other mobility devices. Such inaccessibility often also renders centers unsafe for blind and Deaf learners.

Inappropriate and Inadequate Provision of Support Services

Particular enabling mechanisms and processes are needed to support diversity and enable the education system, including educators and learners, to minimize, remove and prevent barriers which may exist or arise. Where no provision exists for such services, barriers cannot be overcome and needs cannot be met.

In some contexts, however, inappropriate or inadequate support services may contribute to learning breakdown or exclusion. For example, where the nature of the service is focused on problems in the learner rather than in the system where the barrier may exist - such as poor teaching methods - the intervention may exacerbate the learning breakdown. Similarly, the nature of the intervention may lead to a learner being removed from a learning environment rather than addressing the problems which may exist in that environment. Learners who may require individualized intervention to address barriers to learning may also not have access to these.

As was discussed earlier, basic services which may support learners and the system to minimize and remove barriers or prevent them from arising are often lacking or limited in poorer communities. This is especially true in rural areas where access to professional assistance is limited or non-existent. Thus the inadequacy or unequal distribution of services which do exist may further disadvantage learners rather than being services which contribute to effective learning.

One of the key contributing factors to inappropriate and inadequate support provision relates to the nature of human resource development of both educators and personnel who provide services to learners and their families. Lack of awareness, service provision which is fragmented and inappropriate to the context in which it takes place, demoralization and a fear of dealing with a diverse range of needs all result from inadequate and fragmented development of human resources. Not only does poor provision in this area lead to a dearth of necessary skills and knowledge but it also contributes to a system which is unable to meet a diversity of learner needs and prevent barriers to learning and development.

Lack of Enabling and Protective Legislation and Policy

Many of the barriers to learning and development discussed above do not merely arise from problems occurring in the education system or in the wider society. It is often policy and legislation governing the education system and regulating the society which directly or indirectly facilitate the existence of such barriers. Where such legislation or policy fails to protect learners from discrimination or perpetuates particular inequalities, it directly contributes to the existence or maintenance of such barriers. For example, policy which is inflexible regarding issues such as age limits may prevent learners from being able to enter or continue in the education system, thus leading to exclusion. Similarly, legislation which fails to protect learners from discrimination and fails to provide for minimum standards which accommodate diversity allows for individual practices which may inhibit learner development or lead to provision which is inadequate and inappropriate for the needs which exist.

Lack of Parental Recognition and Involvement

The active involvement of parents and the broader community in the teaching and learning process is central to effective learning and development. Such involvement includes recognition for parents as the primary care givers of their children and, as such, that they are a central resource to the education system. More specifically, they are critical components for effective governance of centers of learning and for facilitating community ownership of these facilities.

Where parents are not given this recognition or where their participation is not facilitated and encouraged effective learning is threatened and hindered. Negative

attitudes towards parental involvement, lack of resources to facilitate such involvement, lack of parent empowerment and support for parent organizations, particularly in poorer communities, all contribute to a lack of parental involvement in centers of learning.

Disability

For most learners with disabilities, learning breakdown and exclusion occur when their particular learning needs are not met as a result of barriers in the learning environment or broader society which handicap the learner and prevent effective learning from taking place. Having said this, however, particular impairments may prevent the learner from engaging continuously in structured learning and development. Such impairments may render the learner unable to participate in an ideal process of learning. For example, disabilities such as schizophrenia, severe autism, severe intellectual disabilities or multi-disabilities may prevent the learner from being able to continuously engage in programmes aimed at facilitating learning and development. Some learners also experience learning breakdown due to intrinsic cognitive or learning difficulties in areas such as in acquiring skills in literacy or numeracy or in the organization or management of their own learning.

Lack of Human Resource Development Strategies

The development of educators, service providers and other human resources is often fragmented and unsustainable. The absence of on-going in-service training of educators, in particular, often leads to insecurity, uncertainty, low self-esteem and lack of innovative practices in the classroom. This may result in resistance and harmful attitudes towards those learners who experience learning breakdown or towards particular enabling mechanisms.

Overcoming Barriers to Learning and Development

If the education system is to promote effective learning and prevent learning breakdown, it is imperative that mechanisms are structured into the system to break down existing barriers. Such mechanisms must develop the capacity of the system to overcome barriers which may arise, prevent barriers from occurring, and promote the development of an effective learning and teaching environment.

Central to the development of such capacity is the ability to identify and understand the nature of the barriers which cause learning breakdown and lead to exclusion. Over and above this, however, such capacity requires a commitment to

using and learning from practices and processes which exist within the system itself and which have been used or can be used to break down barriers and meet the range of needs which are present.

Such mechanisms will include: initiatives aimed at providing for learners who have been excluded from the system by both the state and non-governmental organizations; innovative practices for recognizing and accommodating diversity; activities that advocate against discrimination and challenge attitudes; processes towards the involvement of learners, parents, educators and community members in the governance of centers of learning; training programmers which equip educators to deal with diverse needs; curriculum restructuring; organization and development of teaching and learning environments; as well as economic and political transformation supported by enabling and protective legislation and policy.

Conclusion

The above narrative is offered as a possible narrative for reducing inequalities in planning education. This chapter provides guidance to education departments concerning structural change and programme change since most education departments have a tendency to respond to the environment pressures without examining sufficiently the operational capability of white papers and policy that is developed to reduce inequality. At an international level, 17 Sustainable goals have been developed by the UN General Assembly. Hak, Janoušová and Moldan, (2016) explain the challenges to this process. At the UN in New York the Open Working Group created by the UN General Assembly proposed a set of global Sustainable Development Goals (SDGs) which comprises 17 goals and 169 targets. Further to that, a preliminary set of 330 indicators was introduced in March 2015. Some SDGs build on the preceding Millennium Development Goals while others incorporate new ideas. A critical review has revealed that indicators of varied quality (in terms of the fulfilment certain criteria) have been proposed to assess sustainable development. Despite the fact that there is plenty of theoretical work on quality standards for indicators, in practice users cannot often be sure how adequately the indicators measure the monitored phenomena. Therefore we stress the need to operationalise the Sustainable Development Goals' targets and evaluate the indicators' relevance, the characteristic of utmost importance among the indicators' quality traits. The current format of the proposed SDGs and their targets has laid a policy framework; however, without thorough expert and scientific follow up on their operationalisation the indicators may be ambiguous. (Hák et al., 2016) The challenge is spelt out clearly by Hak et al. (2016) that most of the policy papers do not offer an operational capability. This chapter has attempted to do that.

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Chapter 5
African Descendants' Globalization Challenges, Human Rights and Education Dilemmas Across the African Diaspora: Flipping the Script and Rewriting Narratives

Kassie Freeman

Abstract In order to understand the Black population's global challenges, including human rights abuses and educational dilemmas, it is crucial to have context. The dispersal and the treatment thereafter were similar across countries. Therefore, there is great need to place African descendants' experiences in context in order to understand the need to rewrite their current narrative. This chapter, while highlighting the educational challenges confronting African descendants across countries, focuses on the current status of African descendants' human rights, education conditions and policies, and can provide amazing opportunities for developing new narratives and collective solutions.

Keywords African diaspora · Black populations · African descendant · Globalization · History · Human rights · Education · Inequality · Racism · Rewriting narratives · Social justice · Transatlantic slave trade

African Descendants' Globalization Challenges: Introduction

It is unfortunate that it took a pandemic and continued police brutality to highlight African descendants' ongoing and chronic inequality, whether economic, educational, and/or healthcare. While the Black Lives Matter (BLM) Movement had been silenced, police brutality and the disproportionate impact of COVID-19 on African descendants awakened the movement, not just in the USA but worldwide (Booth & Barr, 2020 May 07; Bunn, 2020 March 26; Levenson, 2000 April 7). More clearly

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than ever, African descendants have demonstrated their existence and similar conditions across regions and countries, the Caribbean, Europe, North and South America. They have also exhibited a growing solidarity—the need to collectively address similar challenges and conditions because, in most cases, outside of Africa, Brazil and Caribbean nations being the exception, African descendants are minority populations (Booth & Morris, 2020 May 31). While many people are not aware that Black populations even exist in Canada, Mexico, European, and South American countries, in most cases, African descendants have lived in these countries since the Transatlantic Slave Trade (slavevoyages.org; Blakely, 2008 February 9).

In order to understand the Black population's global challenges, human rights abuses, and educational dilemmas, it is crucial to have context. The dispersal and the treatment thereafter were similar across countries. Therefore, there is a great need to place African descendants' experiences in context in order to understand the need to rewrite their current narrative. According to Manning (2018), Africa and the African Diaspora comprise one sixth of the human population—over one billion in Africa and over 300 million in the Americas, Europe, and Asia. The historically forced African enslavement and more recent migrations from Africa and the Diaspora raise serious challenges to the provision of quality education for these communities. Efforts at social renewal by emancipated communities brought great investment in education and further efforts to achieve economic and social advance. Despite great community efforts, continuation of past discrepancies means that, across countries and continents, African descendants continue to face difficult conditions as educational opportunities remain limited (Manning, 2018).

This is a timely retrospective of the comparative state of human rights abuses and educational participation across the African Diaspora, given that 2019 was the 400th year commemoration of African descendants' dispersal to the shores of America in August 1619. African Americans constitute the second largest African descendant population outside of Africa, Brazil being the largest. In the United States, Europe, South America, and across the globe, people of African descent face similar, seemingly intractable challenges that result in disparities in educational outcomes across societies, particularly as it relates to education participation. In many respects, African descendants still face a common set of challenges for full participation in the societies in which they were involuntarily dispersed or to which they migrated.

As Alford (2010) wrote in a piece titled, *Connecting the Dots Within the Black Diaspora*, it is time that Blacks across the Diaspora better understand their common education dilemmas, challenges and opportunities for addressing these situations. There are broader and different stories about African descendants' experiences. Therefore, this unprecedented time of the worldwide pandemic presents a unique opportunity to rewrite narratives collectively as opposed to nationalistically, given African descendants' minority status in most countries and regions—Africa, Brazil and the Caribbean being the exceptions. African descendants' global denial of equal rights for educational opportunities present striking challenges and opportunities for an internationalist educational agenda, as opposed to a nationalist agenda. While there is a paucity of even basic data on the status of African descendants across

countries, making comparative research a challenge, individual country research, where available, on educational challenges presents striking similarities for African descendant populations—the most uneducated, undereducated, highest level of poverty, and educational participation challenges (Manning, 2018). This chapter, while highlighting the educational challenges confronting African descendants across countries, focuses on the current status of African descendants' human rights, education conditions and policies, and can provide amazing opportunities for developing new narratives and collective solutions.

The African Diaspora, Its Meaning and Context

With all the worldwide debates about the impact of globalization on every aspect of cultures, from the environment to technology to the economy and education, it is astonishing that around the world, Black populations (used simultaneously in this chapter as African descendants) remain underrepresented at every level of schooling. Yet, economics of education theorists have long ago documented the linkages between education participation, economic development, political participation, and environmental justice (Shultz, 1961). With such documentation, it is surprising that there is such a dearth of research and/or focus on the comparative struggles that Black populations share in their quest to participate in education.

Writers of seminal works across disciplines (e.g., history and the humanities) such as Baldwin (2002) and Lorde (1992) have challenged the existing paradigm used to understand and examine the cultural link between Blacks in the Diaspora. However, educational researchers have been slow to see or move beyond the Black National model of examining educational under-representation. Consequently, the necessity of refocusing and/or shifting to a different paradigm to examine the comparative, common educational experiences Black populations confront globally have gone largely misunderstood and under-examined. This perspective, utilizing a broader, cross disciplinary and cross boundaries approach, makes the case for African descendants' paradigm shift and new narratives from a Black Nationalist model to a Black Internationalist model to examine Black educational challenges globally.

A Black Nationalist model is a particularized model where African descendants in each country focus on their challenges in isolation, whether issues of education, economics, police brutality, or environmental justice. A Black Internationalist model differs from a single focus paradigm to one that builds on the collective, comparative experiences of Black populations globally. Contrary to common perceptions that there are more differences than similarities between Black populations, this research makes the case for an expanded paradigm to researching and developing an international agenda for better understanding educational challenges confronting Black populations globally.

African Diaspora – Its Meaning

Utilizing the definition of the African Diaspora Consortium (ADC), 2020, the African Diaspora can be defined as historically dispersed African descendant populations during the transatlantic slave trade and different migration periods. Constituting the largest forced migration/dispersal process in history, African descendants were dispersed across regions and countries (slavevoyages.org). Therefore, African descendants currently reside in all regions, Asia, Caribbean, Europe, North America, and South America, not just in the USA, as is often thought.

Given the dispersal and migration process, intuitively, African descendants must historically have and currently face similar economic, education, and human right challenges. Yet, according to Freeman (2010), research and scholarship have tended to focus on these challenges nationally rather than comparatively or collectively internationally.

As a result of the common historical and current similarities in experiences across countries, there are many reasons for educational and human rights issues to be studied comparatively and globally. In a globalized world, addressing these issues collectively provides the opportunity to create different and new possibilities. Based on common historical experiences that have given rise to current conditions, African descendants, working collectively across the African Diaspora can define new narratives, create global social justice advocacy, and address economic, educational and health inequities, while developing new paradigms and best practices.

Reflections on Current African Descendants' Global Experiences

The worldwide pandemic has wreaked havoc on African descendants globally and has exposed inequality in every facet of life, from health and healthcare disparities and disproportionate deaths due to COVID-19 to economic and social injustices, highlighting as never before police brutality. Institutional racism has been highlighted across countries (Booth & Morris, 2020 May 31). Even in countries, like France and Germany, that do not allow self-identification by race/ethnicity, inequities have been demonstrated (Booth & Morris, 2020 May 31). While these injustices are continuing to be exposed, a new narrative is being written. The Black lives Matter (BLM) movement is demonstrating the solidarity of African descendants across the African Diaspora (Booth & Morris, 2020 May 31). Similar stories are being told and inequities captured. African descendants are demonstrating the power of collective voices as opposed to nationalistic voices, the power of global advocacy. Yet, to understand what spun the beginning of a new narrative, it is crucial to understand what created the backstory to the current events and crises.

To better understand the similarities of African descendants' economic, educational, and human rights experiences, it is imperative to have a minimal review of the

history. There were similar historical experiences, the Transatlantic Slave Trade, that have led to the necessity of a new narrative, the movement away from a single narrative —including solidarity and collective voices.

Different Countries, Similar Historical Experiences

As James Anderson has so rightly indicated in numerous writings and speeches (e.g., 1988 and 1994), to understand the educational experiences of Blacks, it is necessary to examine the historical context of their existence. Although, as Lorde has indicated, Blacks in different countries have experienced particular histories, as it relates to their humanity and their pursuit of education, Blacks across societies have had similar experiences. The common historical linkage among Blacks in the Diaspora is captured by Opitz et al. (1992) who wrote in reference to Afro-Germans: "In the course of colonial exploitation, enslavement, and domination "Negro" (from Latin niger, i.e., black) became an especially negative epithet. The thinking underlying this label attempted to link physical characteristics with intellectual and cultural ones" (p. 7). That is, across cultures, being Black has historically been thought of as being intellectually inferior and being without a culture or having a primitive or uncivilized culture.

While often not recognized, Blacks have been a part of European societies in most cases longer than in America. For example, Fryer (1992) who wrote what would be considered the seminal work on Blacks in Britain, indicated that African descendants have been in Britain for centuries; as a group they "have been living in Britain for close on 500 years. They have been born in Britain since about the year 1505" (p. ix). That would mean that based on American history, Black Britons, as a group, were in England more than one hundred years before the arrival of Blacks in America in Jamestown, Virginia, in 1619 (Clarke, 1972). While Opitz et al. (1992) indicated that "there is no precise method of determining when the first Africans came to Germany and when the first Afro-Germans were born," they indicated that "several paintings have survived from the twelfth century that depict Africans living in Germany" (p. 3). Although the exact arrival of Blacks across cultures may be unclear, what is certain is that by the mid-sixteenth and seventeenth centuries Blacks were settled in countries around the globe. For example, "in the mid-sixteenth century, one-tenth of the population in the Portuguese capital were Black, and, as in France and England, it was probably also true in Germany" (Opitz et al., 1992, p. 3).

Blacks in different countries faced similar treatment in the portrayal of their culture. Blackness was associated with evilness, inferiority in every way, and sub-humanism. In Britain, for example, "Africans were said to be inherently inferior, mentally, morally, culturally, and spiritually, to Europeans" (Fryer, 1992, p. 7). Likewise, in Germany, Blacks were portrayed negatively. In general, "Africans were seen as the lowest human form, thought to be related to the highest animal form, the monkey" (Opitz et al., 1992, p. 8). As well, "Most Portuguese seem to have

thought that blacks as a people were innately inferior to whites in physical beauty and mental ability and moreover, that they were temperamentally suited to a life in slavery" (Saunders, 1982, p. 166). On a different continent, Blacks in the US were experiencing the same devaluation of their humanity. In the US, this statement about the use of Slave Codes best captures how Blacks were viewed: "There were variations from state to state, but the general point of view expressed in most of them [Slave Codes] was the same, that is: slaves are not persons but property, and laws should protect the ownership of such property, and should also protect the whites against any dangers that might arise from the presence of large numbers of Negroes" (Franklin & Moss, 1988, p. 114). This devaluation of the Black culture according to Clarke (1972) caused Africans the world over by the nineteenth century, to begin to search for a definition of themselves.

Another similar link in the historical experiences of Black populations was the exploitation of their labor. As Clarke (1972) indicated, "The story of the African slave trade is essentially the consequences of the second rise of Europe.... They were searching for new markets, new materials, new manpower, and new land to exploit. The slave trade was created to accommodate this expansion" (p. xvii). Just as Blacks in America were relegated to working the land and as servants to increase the wealth of this country, so were Blacks in European countries. For example, according to Fryer (1992), "The majority of the 10,000 or so black people who lived in Britain in the eighteenth century were household servants--pages, valets, footmen, coachmen, cooks, and maids--much as their predecessors had been in the previous century" (p. 73). Although working menial jobs, Fryer conceded that as a Liverpool writer declared in 1893, "it was the capital made in the African slave trade that built some of our docks' and the price of human flesh and blood that gave us a start" (p. 66). Similarly in Germany, Blacks were used for menial labor. In Germany, for example, Blacks "were forced to cultivate export products or to work on the plantations and in the mines of whites" (Opitz et al., 1992, p. 25). The same was the case in Portugal. According to Saunders (1982), "The nobility employed--or underemployed--large numbers of slaves solely as domestic servants" (p. 63).

When Blacks were interested in working higher status jobs, they were forbidden. For example, in London after 1731, Blacks were not allowed to learn a trade. In fact, on September 14 of that year the lord mayor of London issued the following proclamation prohibiting apprenticeships for Black people:

> It is Ordered by this Court, that for the future no Negroes or other Blacks be suffered to be bound Apprentices at any of the Companies of this City to any Freeman thereof; and that Copies of this Order be printed and sent to the Masters and Wardens of the several Companies of this City, who are required to see the same at all times hereafter duly observed (cited in Fryer, 1992, p. 75).

Although there were some Blacks in the US who possessed some skills, especially the few slaves who lived in towns, the great majority of slaves' responsibilities were divided between two distinct groups, the house servants and the field hands (Franklin

& Moss, 1988). According to these researchers, slaves had little opportunity to develop initiative because their responsibilities were proscribed for them. Therefore, the idea that Blacks did not want to work and thus played a role in having their skills underutilized was not the case.

Understandably, the exploitation of labor is and has always been intricately linked to lack of educational opportunities. To keep groups uneducated or undereducated has been a formula across societies for the underutilization of their talents. Nkrumah, the son of the late African leader, describes it as a sort of worldwide formula where African descendants everywhere have been relegated to the bottom educationally and economically. As such, the idea has been to prevent Blacks from being empowered intellectually, culturally, and economically.

As Anderson (1988) has indicated, it is through education that individuals begin to feel empowered, and African Americans were active agents in their right to be educated. From slavery until now, African Americans have had to struggle to have the opportunity to participate in any form of education. According to Anderson, "Blacks emerged from slavery with a strong belief in the desirability of learning to read and write" (p. 5). As an example of the intensity of anger that slaves held for keeping them illiterate, Anderson quoted a former slave: "There is one sin that slavery committed against me which I will never forgive. It robbed me of my education" (p. 5). Restrictive legislation was passed to prohibit slaves from learning to read and write (Fleming, 1981). According to Fleming, from 1850 to 1856 less than 5 percent of African Americans out of a population of 4.5 million could read and write.

Just as Blacks in America were forbidden to learn to read and write, the same was true in other countries where the controlling population was non-Black. In Portugal, for example, Saunders (1982) indicated that very few Blacks were able to read and write.

As Opitz et al. (1992) indicated as it related to Afro-Germans, "The limitations of educational opportunities concurrent with the favoring of some individuals led to hierarchical structures that undermined the solidarity of the community" (p. 33). In that sense, not only has lack of educational opportunities been utilized to limit the use of the talent and skills of Blacks but education has also been used as a force to destabilize communities. That is, education as a commodity has been used as a means to favor some intra-group members over others as a way to undermine community relationships. In Portugal, for example, mulattoes were thought to be more conversant "with Portuguese customs, were supposed to be more gifted intellectually than were blacks from Africa" (Saunders, 1982, p. 172).

Therefore, the commonality of the Black historical experience in countries where non-Blacks are the dominate populations has been the underutilization of the potential of Blacks through demeaning their humanity through the slavery experience, destabilizing their communities, exploiting their labor, and limiting their educational opportunities. However, even when Blacks were allowed to participate in education, a process of cultural alienation and/or annihilation was implemented.

Human Rights and Education Dilemmas Across the African Diaspora

When Blacks have had the opportunity to participate in education, as it relates to education inequities, Searle, 1994, indicated a "culture of exclusion" has existed. Searle describes "culture of exclusion" as it relates to Black Britons in this way: "There is much mystification surrounding the word 'exclusion' in education parlance. Schools do not refer to 'expulsions' now, even though almost all parents would know what that means. The preferred term is 'permanent exclusion', but it comes to the same thing" (p. 19). Searle reported that secondary schools "in Nottingham, Reading, Bristol and the north London borough of Brent showed that black students were up to six times more likely to be suspended from school than their white peers" (p. 24). Drawing on the research of Searle and Bridges (1994), a culture of exclusion, then, can be defined as that process whereby Black children are excluded from schooling, whether through suspension or expulsion or placement in the lower tracks of schooling--which would be referred to as "internal expulsion" (Bridges, p. 11).

Educational expulsion (suspension) is a phenomenon that is similarly faced by Black populations globally. For example, the late honorable Fernando Ka (1998), in a report on the conditions of Blacks in Portugal, indicated the following: "The black community in general--and the children and young people in particular--are victims of educational expulsion. The number of those that manage to complete compulsory education (up to the 9th grade) is significantly low, and even worse if we consider the number of those who manage to complete secondary education (12th grade)" (p. 2) in the US, as in Britain and Portugal, a greater number of Black children are subjected to suspension or expulsion. For example, a comprehensive study conducted by the Children's Defense Fund (1975) in the 1970s reported the following:

> No one is immune from suspension, but black children were suspended at twice the rate of any other ethnic group. Nationally, if they had been suspended at the same rate as whites, nearly 50 percent or 188,479 of the black children suspended would have remained in school. Although black children accounted for 27.1 percent of the enrollment in the districts reporting to OCR, they constituted 42.3 percent of the racially identified suspensions (p. 12).

In support of these earlier findings, in a more recent study, Morris and Goldring (1999) cited studies that concluded that "desegregation was often accompanied by an increase in the overall student suspension as well as a high disparity between black and white student suspension" (pp. 60–61). However, the greatest numbers of African American students are subjected to "internal expulsion." In a report (Klenbort, 1999) in the Southern Regional Council periodical indicated, as an example, a statement from a high school sophomore who spent his schooling in the lower-level track: "You live in the basement, you die in the basement. You know what I mean?" Researchers, such as Oakes (1985), Wheelock (1992), and Braddock II and Slavin (1995), support this student's description of tracking or what can be referred as internal expulsion. Page and Page (1995) describe how tracking became

the norm following desegregation: "Schools in the region [Southern region] became increasingly resegregated through the use of tracking, with the majority of African American students assigned to lower tracks and the majority of Caucasian students assigned to higher tracks" (p. 73).The way in which tracking can best be thought of as "internal expulsion" is best captured by Oakes (1985) and Braddock II and Slavin (1995). For example, Braddock, II and Slavin indicated that the effects of tracking on students were striking. They found that students in lower tracks performed significantly less well than similar low achievers in untracked schools and were much more likely to end up in non-college-preparatory programs by tenth grade. This effect, they suggested, "being in the low track in eighth grade slams the gate on any possibility that a student can take the courses leading to college" (p. 8). Oakes suggested that "lower-track students are more alienated from school and have higher drop-out rates" (p. 9). These researchers also found that tracking hurts students' self-esteem, causing them to feel inferior. Based on these researchers' findings, then, the effects of tracking on students' life chances is tantamount to being excluded. That is, Black students who are in tracks are in school but because they are more likely to drop out or to have limited opportunities beyond secondary school, in a sense, the school has excluded them. Morris and Goldring (1999) in their study on disciplinary rates of African American and White students in Cincinnati magnet and nonmagnet schools explained it in this way: "The overall effect of disciplining students, which involves removing them from the classroom, will drastically impact students' acquisition of educational materials presented by the teacher. Other long term effects might include African American students falling behind academically, or worse, dropping out of school altogether" (p. 64).

Whether internally excluded or suspended or expelled, Black students globally share similar experiences. At least, as described in Britain, Portugal, and the US, Black students comprise the majority of students facing a "culture of exclusion." This "culture of exclusion" has led to the underutilization of Blacks in education which, in turn, has implications for societal and individual costs.

The Power of African Descendants' Identities and Different Narratives

This research suggests that to more fully comprehend the educational dilemma and human rights abuses of black populations in particular countries it is important to examine their experiences individually yet collectively. As Lorde (1992) indicated, although particular histories have fashioned the experiences of Blacks in different countries, similar historical experiences make the case for expanding the research agenda on Black populations-- intra-, inter-, and across cultures. This work suggests to better understand the experiences of Black populations that a more in-depth comparison of the historical experiences and how the impact of these experiences have constructed the current educational phenomenon and human rights abuses

which Blacks find confronting them, supporting James Anderson's (1988) position. As pointed out in this research, Blacks in different countries have had similar historical experiences, and it is important for these to be examined collectively in order to determine where similar programs and models might be instituted. When cultural differences are taken into consideration, the wheel might not have to be reinvented.

Another agenda that this research suggests is that, not only is it important to expand the research agenda across borders to understand the Black educational experience, but it supports the necessity of examining the educational experiences of Blacks across disciplinary boundaries. That is, better linkages between the different research agenda (whether K-12 and higher education or different aspects of educational phenomena) need to be established. This research demonstrates how each aspect of the Black experience impacts on each experience and level of schooling.

To better understand the barriers constructed across cultures to underutilize the potential of Blacks' human potential in countries where non-Blacks are the controlling populations much more research needs to be conducted. In order to more fully understand this process, more research on each point where underutilization occurs has to be explored. To understand the costs, particularly the nonmonetary costs, as Bowen (1977) indicated, associated with the underutilization of Black potential so that countries better understand how everyone is losing is an imperative. The quote from the Commission on Research in Black Education from Wendell Berry (1968) summarizes the imperative of countries to assess the underutilization of the human potential of Black populations: "If the white man has inflicted the wound of racism upon Black men, the cost has been that he would receive the mirror image of that wound into himself."

Rewriting African Diaspora Narratives

As pointed out in this research, there are merits for rewriting and/or writing a different narrative about African descendants' experiences. According to Clarke (2014), it is important and necessary to bridge the gap of African descendants' experiences across the African Diaspora. In order to do so, old paradigms must be challenged and a new narrative must be written. Who writes the narrative (different voices, from the perspective of the African Diaspora not the other) has importance. Much of the history and current dilemmas, as pointed out, have been written by individuals outside of the African Diaspora.

How the narrative gets written is also crucial. As Adiche (2005) highlights, there are dangers of a single story. She defines a single narrative as one where only one aspect of a story is told and keeps getting replicated (highlighting the dangers of a single story). The dangers of a single narrative, according to Adiche, is that it can create a false truth that comes to be the defining culture of history of a people, place and culture, over time. However, she makes the case of the importance of multiple

perspectives of any group's experiences, that is, what can be the new and different message across the African Diaspora. The new narrative should be a collective, multi-voice approach, using history as a backdrop and a springboard providing new and different paradigms and problem solving. The focus of the narrative should be on bridging the divide, with an emphasis on global advocacy. Given this approach, the narrative will be based on resilience and on the African descendants' positive impact on cultures wherever they were dispersed across the African Diaspora. It will be a positive and unifying narrative across cultures and groups.

Conclusion

Finally, though, it is not enough for countries to assess the costs associated with the underutilization of the potential of Black populations, for this research suggests that at each point Blacks have been underutilized. In the twenty-first century, it is necessary to develop strategies to address the societal and individual costs associated with Black populations' underutilization while simultaneously increasing the utilization of the potential of Blacks. Carnoy (1994) describes the way the process of increasing the spending on the underutilization of Blacks should work: "The vicious cycle of increasing social costs will gradually break. Down the road, as early-childhood investment reduces spending on adult social problems, more public funds will become available for general education and other activities that improve worker productivity and growth rates" (p. 241). However, countries have not yet been able to develop a formula for assessing the individual and societal costs therefore to appropriately target their spending. For globalization to be successful for individual countries and countries collectively, the potential of all of their citizens have to be utilized. In order to balance this imperative, different paradigms and players have to be a part of the research agenda and the agenda has to be expanded, particularly to address the educational challenges and human rights abuses confronting Black populations. This must be done by utilizing the collective, comparative experiences of Black populations globally, an internationalist model.

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Chapter 6
Coping with Globalisation and Disruption: The Making of Higher Education Reforms in Singapore

Michael H. Lee

Abstract Singapore used to adopt a developmental state approach with a strong emphasis on education to meet its socio-economic development needs since 1965. Higher education policy development and implementation is without doubt driven by the government which also provides strong and substantial financial support. As skilled manpower and new knowledge generation are critical tasks for the universities, the Singapore government also provides considerable financial and manpower resources for research and development (R&D). Witnessing the growing importance of applied research and learning, new initiatives have been introduced to tighten the linkage between academic research and socio-economic needs. Moreover, in order to become a regional education hub, Singapore's higher education system hosts a number of prestigious institutions and international partnerships. In addition, with higher education being considered as essential to promoting upward social mobility, the government has adopted policies to ensure a level playing field enabling all capable students, regardless of their socio-economic backgrounds, to succeed in accordance with the fundamental principle of meritocracy in Singapore. This is an important step taken to tackle the issue of social and educational inequality which is commonly found in other developed or affluent countries. It is also noteworthy that the unprecedented disruption caused by the outbreak of COVID-19 pandemic is not surprisingly a critical challenge facing the future development and prospect of higher education in Singapore and around the world. This chapter examines how features of globalisation such as international rankings, quality assurance and international collaboration are expressed in the Singapore context. It will also probe into policy lessons that can be drawn from Singapore's experience and what challenges Singapore faces in meeting its evolving vision for higher education.

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The Making of Higher Education Reforms in Singapore: Introduction

Although Singapore has emphasized education to meet its socio-economic development needs since its independence in 1965, with the advent of the knowledge economy Singapore has been reshaping its economy. For instance, the Singapore government has addressed the growing importance of the Fourth Industrial Revolution or Industry 4.0 with the application of artificial intelligence to renew and upgrade its manufacturing industrial sector, which remains a pillar of the Singapore economy alongside other economic sectors like logistics, tourism and financial services, with more advanced technologies and highly skilled labour force, most of which are with tertiary education qualifications. Education constantly plays a prominent role in making Singapore a First World economy as the island-state comes with no natural resources but manpower for making economic progress and development possible. With the rise of the knowledge-based economy in the twenty-first century, there has been a great deal of policy over the past two decades to position the university and research sectors so they can meet the knowledge challenge. For instance, the Singapore University of Technology and Design (SUTD) was established in 2012 after the other four state-sponsored degree-awarding institutions, namely, the National University of Singapore (NUS), Nanyang Technological University (NTU), Singapore Management University (SMU), and Singapore Institute of Technology (SIT). In 2017, Singapore University of Social Sciences (SUSS), formerly the self-financed UniSIM, was officially made the sixth state-sponsored autonomous university mainly catering to working adults' need of further studies at the degree level. Internationalization is a top priority for all these universities by strengthening their international links through various means. This coincides with Singapore's aspiration to become a regional education hub by hosting a couple of prestigious institutions which offer both collaboration and competition opportunities.

This chapter examines how features of globalisation such as international rankings, quality assurance and international collaboration are expressed in the Singapore context. It will also probe into policy lessons that can be drawn from Singapore's experience and what challenges Singapore faces in meeting its evolving vision for higher education. Apart from the introductory section, there are four sections in this chapter. The first section reviews the concept of the developmental state and its application in the Singapore context. The next section examines how the development of higher education in Singapore has been affected by internal and external challenges. In the penultimate section, it discusses the policy lessons to be learnt from the Singapore case. Then the concluding section comes with some

observations about implications for the future evolution of higher education in Singapore.

The Developmental State of Singapore

Singapore is characterized as a "developmental state", which, according to Castells (1992), refers to its ability to gain legitimacy through promoting and sustaining socio-economic development. Since its independence in 1965, the Singapore government has consistently and strongly emphasised development strategies to promote economic growth; a consequence has been a significant presence of foreign direct investment in Singapore's export-oriented economy. What has concerned the Singapore government most over the years is the survival of this young island-state which is endowed with no natural resources except human resources but occupies a strategic location in the international trade and economic network. Apart from boosting economic growth and development, ensuring progress, stability and racial harmony in the only Chinese-dominated multiracial and multicultural society in Southeast Asia is also among top priorities for Singapore under the political rule of the People's Action Party (PAP) since 1959.

A viable state via value-added economic development in the context of the global knowledge economy can only be accomplished, the state believes, with a sufficiently large pool of high quality labour, especially when knowledge is now regarded as the most important factor contributing to the unprecedented and rapid, if uneven, pace of economic growth and development around the world. In fact, survival is treated not only as a political slogan but also as a dominant theme for strengthening the political legitimacy of the government and enabling it to mobilize popular support for the implementation of its domestic and foreign policies formulated by the ruling party (Chan, 1971). A strong economy, a commitment of full employment and the availability of high quality social infrastructure such as education, housing and health care, which have been built up over a short period of time, is a prerequisite for sustaining a stable socio-political environment in Singapore in face of increasing uncertainties and volatility in the globe.

Singapore experienced the transformation from being a fragile state in the 1950s, when the island weathered much socio-political turbulence like labour strikes, student movements and racial riots through its process of decolonization, to becoming a strong newly-industrialized state by the mid-1970s as a consequence of adopting the politics of survival, with a steady determination not to fail as a nascent independent nation-state (Chan, 1971). The Singapore state built its legitimacy not just by claiming to rule on behalf of community and nation, fostering racial harmony and strong economic development, but also by actually delivering on its promises. Its politics pervasively affect all aspects of life in Singapore and Singaporean citizens broadly accept social control and state intervention in their lives (Gopinathan, 1997; Pang, 1993). Singapore's reputation for good and effective governance in the political, economic and social realms in Singapore is generally

well deserved (Green, 1997); the leadership is highly able and the bureaucracy is competent and responsive.

In order to cope with the growing needs of socio-economic development in the midst of changes leading to the knowledge-based economy and, more recently the Fourth Industrial Revolution, the Singapore government continues to play an important role in shaping higher education policy and development, concomitant with a strong commitment to providing strong and substantial financial support to public universities. This proactive role played by the state in the Singapore economy, which Linda Low (1998) labelled it as "government-made," demonstrates the extraordinarily strong capacity and capability of the developmental state in Singapore to generate and implement plans for continued economic growth to improve productivity, and to resist political pressures from such forces as labour unions and employers has clearly contributed to economic success in Singapore. Singapore is thus a case of successful state capitalism. Regardless of the general perception of weakened state authority and capacity with the rise of neoliberalism under the profound influence of globalisation (Taylor et al., 1997), the state in Singapore and its control over the economy and society remains significantly strong. For higher education, there is little evidence of the state's retreat from shouldering its financial obligations and responsibilities in Singapore even though certain New Public Management policies and practices, which are common in the Anglo-Saxon countries, have also been put in place with a clear aim to make the state-sponsored autonomous universities to be highly responsive and accountable to national, economic and social needs (Ministry of Education, 2000; Sidhu, 2009). Not surprisingly, for Singapore, as a major economic player itself, education is considered highly instrumental for this strong and autonomous developmental state to achieve sustainable socio-economic development (Gopinathan, 2007).

Policy Challenges and Responses

In the decades since the 1980s, Singapore has witnessed an extraordinarily rapid development of polytechnic and university education. Given the prioritising of economic development, higher education is used instrumentally as a tool of economic development. With more emphasis placed on high value-added industries, such as technological and service industries since the economic recession of the mid-1980s (The Economic Committee, 1986), qualitative but not merely quantitative growth and diversification in the higher education sector has been the state's response. The institutionalization of quality assurance and audit systems, together with more emphasis on international rankings, is a key feature globally of pressure for greater accountability and more rational resource allocation (Gopinathan & Morriss, 1997; Ministry of Education, 2000). State universities were made autonomous universities from the mid-2000s with greater flexibility and autonomy for student and staff recruitment, budget management and resource allocation. Although the Singapore government remains the major source of funding, there are also

university endowment funds and matching funds to seek alternative sources of donation and funding (Goh & Tan, 2008).

Globalizing Singapore

Globalisation is featured by the global auction for talent (Brown & Lauder, 2001). This is particularly relevant for Singapore where there are no natural resources except for human capital for propelling the nation-state's economic development over the past few decades. The Singapore state has used the regional hub and internationalization strategy, both in terms of the recruitment of a significant proportion of non-local or international students and the forging of alliances and partnerships between local universities and internationally renowned higher education institutions in a wide range of teaching and research collaborations. Moreover, the Economic Development Board, which is the official economic think-tank held responsible for identifying the future direction of economic development of Singapore, invited a few world-class universities especially in the United States and Europe like the University of Chicago, Johns Hopkins University, Duke University and INSEAD to offer postgraduate programmes in Singapore in the early 2000s. For instance, SMU was founded by partnering with the Wharton School of Business, The University of Pennsylvania in 2000; SUTD was established by partnering with the Massachusetts Institute of Technology (MIT) and Zhejiang University in China (Leow, 2010; Tan, 2009); Yale-NUS College was the first liberal arts college set up in 2013 in collaboration between Yale University and NUS; and the Lee Kong Chian School of Medicine in NTU was set up in 2013 on a partnership with the Imperial College in London. These developments suggest that the government recognizes that universities and research institutes are locomotives of knowledge creation, dissemination and application, and Singapore's aspirations to be a First World country cannot be sustained without this focus and investment. In fact, economic development in Singapore has been very much facilitated by substantial investment in human capital. Solid economic growth over the past three decades has meant that resources are available for investment in higher education. The strong role of the state in financing and reforming higher education made it possible for both NUS and NTU, the two well-established research-oriented comprehensive universities, to be ranked among the top Asian universities in international rankings by THES (*The Times Higher Education Supplement*) and QS from the 2010s.

Aspiring to be a global city, Singapore aims to be more than a centre of world trade and financial services. According to Sassen (2006), global cities need to be command points in the organization of the world economy, and also key locations and marketplaces for the leading industries, including financial services, and major sites of innovative productions. In order to become a global city, there needs to be a diversified economic structure, comprised not only of trading and financial industries but also other innovation and knowledge-based economic sectors, to improve Singapore's comparative advantage in the global economy. Policymakers have to

sort out answers to these three questions posed from globalisation and its policy challenges: What strategies are needed by Singapore's developmental state to transform an industrial economy to a post-industrial one, arising from the Fourth Industrial Revolution or Industry 4.0? What roles do the higher education and other research institutions have?

Reforming Disrupted Higher Education

Higher education reforms from the global perspective suggests that policymakers recognize that this more unpredictable and vulnerable context, which is induced from more frequent disruptions arising from global economic crises, geopolitical changes and even the COVID-19 pandemic, will require the workforce to be better-educated and also more innovative and highly adaptive to unprecedented changes and circumstances. Under this situation, lifelong learning turns out to be more likely essential for students and working adults alike so that their knowledge and skills can be most updated to cope with newest developments of the ongoing economic restructuring in more mature and developed economies such as Singapore. SkillsFuture in Singapore is a means adopted by the government to provide incentives encouraging individuals to further studies in continuing education institutions and universities to have their skills upgraded so that they can adapt to a newer and more complex working environment under the influence of Industry 4.0.

Universities are clearly treated as vital state assets, enrolment restricted to the academically able and well resourced regardless of cyclical economic downturns in relation to global and regional crises since the 1980s. Regardless of occasional economic downturns such as what happened during the Asian financial crisis in the late 1990s and the global financial crisis late in the first decade of the 2000s, the Singapore government did relinquish its commitment to support and finance the setting up of new universities, such as SIT, SUTD and SUSS since the 2010s. In Singapore, universities have long been entrusted with the role to provide and advance the scientific, technological, financial and managerial capacity of the country's middle- and high-level manpower and more recently, to provide the research-based knowledge to drive the economy with increased emphasis on technological advancement and artificial intelligence application. Both terms "relevance" and "quality" have been two keywords for the Singapore higher education system and its universities in recent years when they are largely subject to the influence of increasing global and regional geopolitical and geoeconomics fluctuations. In response, for instance, more stringent tenure policy and performance-linked pay and remuneration packages have been put in place in all publicly-funded universities in Singapore since the 1990s when more comprehensive reforms of higher education began to take shape.

Despite growing uncertainties facing the Singapore economy during the time of disruption, it does not pose any negative impacts on the persistence of the Singapore government to continue its considerably strong commitment and substantial

investment dedicated to the higher education system. The state's support for higher education in Singapore is steady and robust. Although there is not the serious problem of resource constraints commonly found in many western developed countries, the Singapore government expects universities to refine their institutional management structures in line with the principle of greater autonomy for greater accountability (The World Bank, 1994). The government has demonstrated its strong determination to develop the state-sponsored autonomous universities into the ones whose academic standards, research quality, resource endowment and managerial efficiency is obviously more concerned with the desire to create world-class universities and to serve as a magnet for talents. The government's commitment is to develop Singapore as a regional education hub capable of drawing in talented non-local students as well as fee-paying students to study and eventually settle and work in the city-state. Policymakers recognize that Singapore can enhance its competitive edge by building up a regional education hub to expand its market share in the growing global education market for students (Economic Review Committee, 2003).

Researching for Industry 4.0

There is a vital connection between R&D and higher education in Singapore, where universities play a leading role in carrying out academic and scientific research with a much strengthened capacity of R&D focusing on scientific and technological innovations. High capacity of R&D is closely related to the state's strong commitment in dedicating substantial public investment in the higher education sector for the continuous expansion of higher education and research institutions as well as the development of new basic and applied research niches. The shift in Singapore's economy towards high value-added and technologically-oriented industries and more professionalized service sectors requires more active engagement in R&D activities, which are essential for improving the technical efficiency of industries as well as management skills and business efficiency. Universities are widely expected to serve as vital agents for enabling post-industrial economic growth and upgrading the workforce with the most up-to-date knowledge and skills developed and adopted in new niche areas such as artificial intelligence, biomedical technology, digital economy and technology, cell therapy manufacturing and sustainable urban food production (Heng, 2019).

The need for a policy on R&D first surfaced in the Economic Committee Report in 1986 that reviewed Singapore's economic strategies following the first ever economic downturn in the mid-1980s (The Economic Committee, 1986). It noted that developed economies often invest more than two per cent of their GDP in R&D while Singapore's investment was less than one per cent. Subsequently, Singapore's

Gross Expenditure on R&D (GERD) as a percentage of GDP increased considerably from 0.85 per cent in 1990 to 2.15 per cent in 2003 and then to 2.77 per cent in 2008 (A*STAR, 2005, 2009). In the 2010s, the same percentage was maintained at over two per cent with 2.2 per cent, 2.4 per cent, 2.1 per cent and 2.0 per cent in 2014, 2015, 2016 and 2017 respectively (A*STAR, 2016, 2018).

The increases noted above reflect the strong commitment of the Singapore government to boost R&D by universities. In 2010, Prime Minister Lee Hsien Loong announced a further S$16.1 billion contribution to support research, innovation and enterprise (RIE) activities over the period of 2011–2015, an increase of 20 per cent over the 2006–2010 period. The amount of government's spending on RIE activities was further increased to S$19 billion, or about 1 per cent of Singapore's GDP, for the period of 2016–2020 (Lee, 2016). According to Lee, Singapore's long-term aim is to be among the most research-intensive, innovative and entrepreneurial economies in the world in order to create high value-added jobs and economic prosperity for Singaporeans.

Further, apart from R&D in science and technology, the Singapore government is also concerned about the importance of research in the fields of social sciences and humanities that the Ministry of Education would set aside S$350 million, a 40 per cent increase from 2011–2015, during 2016–2020 to fund research in such areas as ageing and social mobility that are relevant to Singapore society and develop global networks of researchers and policymakers in conducting cross-disciplinary work with nurturing local talents in both disciplines (Teng, 2016).

Making Higher Education More Affordable

With higher education being considered as essential to promoting upward social mobility, it is important for the government to ensure a level playing field enabling all capable students, regardless of their socio-economic backgrounds, to succeed in accordance with the fundamental principle of meritocracy in Singapore. While social inequality has been recently in the limelight of public discussion in Singapore, there have been policy measures to alleviate the financial burden of lower income families at different sectors of the education system, ranging from pre-school education to higher education. For instance, in order to encourage lower income students to study medicine in NUS and NTU, government bursaries for attendance at medical schools will be substantially enhanced. As a result of the increased government bursaries, lower income medical school students will now need to pay a tuition fee of S$5000 (US$3500) instead of the original fee ranging between S$29,000–S$35,000 (US$20,600–25,000) (Lee, 2019). This is an important step taken to tackle the issue of social and educational inequality which is commonly found in other developed or affluent countries.

Lessons from the Singapore's Experience

The Singapore's experience of higher education development is significantly different from most western developed countries where their constrained financial circumstances would limit the public money spent in higher education. In Singapore, university education is well-resourced, regarded as social investment, clearly aligned to the needs of the economy, and directed and managed by the state. In the context of globalisation, an internationalization strategy has been put into place. Singapore's strategy is not just to attract students but to refine the higher education landscape with a wide range of collaborative partnerships such as those links tied with Duke, MIT, Pennsylvania, Yale and Zhejiang. These measures are aimed at creating a robust university sector with niches and strengths of individual universities to be consolidated and further developed with engagement of internationally renowned or world-class universities. Not surprisingly, such international partnership and collaboration forged between local universities and world-class institutions has proved to be effective to pave a solid foundation for the future development of newly founded universities like SMU, SIT and SUTD which managed to raise their institutional quality and reputation because of the concurrent internationalization policy. These strategies are proving to be working well with the overall aims of differentiating and diversifying the higher education system in Singapore (Ng, 2010).

Furthermore, the case of Singapore demonstrates that the strong developmental state is without doubt a crucial factor contributing to the relative success in both terms of education quality and international standing accomplished by the higher education sector. Drawing from the lessons from Singapore, the section will shed light on policy lessons learnt from the island-state with reference to emerging issues and challenges awaiting the higher education system.

Strategizing the Developmental State's Role in Higher Education

The Singapore government's policymaking and strategic planning are obviously development-oriented that meet the needs of economic, social and political developments. Government agencies, including the Economic Development Board (EDB) and the Agency for Science, Technology and Research (A*Star), also adopt a pragmatic approach to strengthen the Singapore economy by maximising the potentials of niche areas where Singapore enjoys comparative and competitive advantages, such as education and R&D. For instance, education has been promoted as an export industry under the "Global Schoolhouse" initiative launched by the EDB (Ministry of Trade and Industry, 2002). Moreover, as mentioned earlier, R&D has been made a core strategy of economic development to concentrate resources and efforts in several niche areas such as biomedical science, engineering and sustainable food science.

In Singapore, higher education serves to support economic and human capital development and facilitate equitable social outcomes so that economic growth and social stability can be sustained (Woo, 2018). The expansion of higher education serves to enhance labour productivity and raise innovation capacity in Singapore, where a strong emphasis is placed on science and technology, together with expansion of polytechnic and vocational education. The state's strong commitment of heavy investment in higher education and R&D is justified by significant return of investment in favour of high skills creation, high wages and thus higher standards of living (Gopinathan, 2007). Universities, which are clearly treated as vital state assets and are well resourced, have long been entrusted with the role to provide and advance the scientific, technological, financial and managerial capacity of Singapore's middle and high-level manpower and also to provide the research-based knowledge to drive the economy (Gopinathan, 2015; Gopinathan & Lee, 2011; Loke et al., 2017).

During the time of disruption, the developmental state in Singapore has to become even more effective and visionary as in the way it used to plan ahead for the development of public policies, including higher education over the past few decades. In order to better prepare for new trends of global economic development, the government would review the directions and strategies of developing higher education on a regular basis so as to maintain its comparative and competitive advantages. For instance, the massification of higher education has been well-planned and implemented cautiously and incrementally with substantial financial support so as to reach 40 per cent of the university's cohort participation rate by 2020 (Ministry of Education, 2008). The state also plays a very supportive role in promoting, facilitating and financing R&D activities undertaken by universities. All these demonstrate clearly that the developmental state keeps playing a key role in shaping the development of higher education in Singapore for the sake of nation-building and economic development.

Diversifying Higher Education Pathways

Even as the state continues to play a prominent role in the Singapore higher education system, universities have been facing even more challenges to make adjustments and modifications in response to the changing socio-economic contexts of Singapore. The rise of global market competition and the emergence of the Fourth Industrial Revolution are crucial determinants on how the higher education system will evolve in the twenty-first century. The future of university education should go far beyond attaining academic excellence as shown in key performance indicators and international rankings. What is more important is concerned about how to enable students to equip themselves with skills which are necessary for them to stay competitive in the global employment market. It is necessary to cure the problem of massive inefficiency and a mismatch between abilities of students and their development pathways (Lim, 2019). Therefore, the future of higher education

development should be about the diversification of learning pathways for students to learn and accumulate the most relevant and updated skills and knowledge to cope with the needs of the marketplace and thus improve their employability.

The enrichment of students' learning experience is to be accomplished by providing alternative modes of learning through internships and students' attachments to industries (Davie, 2020a). Moreover, the workforce is nowadays encouraged to go for lifelong learning to be well integrated with work as there are always needs for knowledge and skill upgrading in response to the global economic changes. Newly-established universities like SIT and SUSS are made to provide alternative pathways focusing on applied degree programmes for polytechnic graduates and working adults for their career development (Davie, 2020b; Ministry of Education, 2012; Tan, 2018). More recently, the government announced it would provide financial incentives to allow 70 per cent of graduates of universities, polytechnics and ITE, to attain overseas exposure or international experience through internship, exchange programme, service learning or study trip in ASEAN, China or India (Cheong, 2020; Heng, 2020). In response to the current wave of disruption arising from the COVID-19 pandemic, diversification and better integration between study and work, together with the promotion of interdisciplinary or cross-disciplinary studies, are set to be the top priorities of higher education development in the post-pandemic era. For instance, in December 2020, the NUS Faculty of Arts and Social Sciences and Faculty of Sciences were merged to become the College of Humanities and Sciences, which marks the very first attempt to promote interdisciplinary education in Singapore.

Ranking Top or Serving Singapore

Higher education in Singapore has been highly regarded and recognized as one of the most outstandingly performed as indicated in various international rankings. Top rankings attained by the two research-oriented comprehensive universities, NUS and NTU, are considered key indicators demonstrating how well the Singapore higher education system has performed in recent years when international rankings on universities have become much more common and popular. Being ranked as among top universities in Asia, both NUS and NTU are able to recruit high quality students and academics from Singapore and abroad in addition to drawing donations and funding to their institutional expansion and R&D activities. Nevertheless, there are concerns about whether universities are too obsessed with international rankings by concentrating most of their efforts in boosting certain key performance indicators such as research publications in top international peer-reviewed journals and citation index data, one of the most commonly adopted criteria to determine the universities' international ranks.

The pursuit of international rankings by most universities would undermine good governance in Singapore as the higher education system in Singapore is skewed toward hiring academics unwilling or unable to engage with important public policy

research (Lim & Pang, 2018). Singapore scholars who pursue local research in fields such as humanities, social sciences, business and law and thus academic research on such public policy issues as poverty, inequality and social mobility are disadvantaged. It was once reported by the Singapore press *Today* in 2019 that some arts and humanities academics quit NUS and NTU in response to their pursuit of rankings and the lack of transparency in the key performance indicators used for the granting promotion and tenure procedure (Ng, 2019). That *Today* article was eventually taken down with both universities clarifying their stands of international rankings and faculty members not being promoted based on rankings but rather on peer review (Jaschik, 2019).

Meanwhile, the Singapore government has urged universities to reduce their focus on global rankings but to train and hire more local academic staff for local research. Then Minister for Education Ong Ye Kung pointed out that current international rankings rely too much on research indicators and overlook areas like experiential learning and entrepreneurship. International university ranks should not just focus on publications and citations but also take into account how universities work with industries, society, communities and government (Teng, 2018). In short, it is thus even more important for universities to strike a right balance between pursuing global rankings and serving the interests of nation-building and socio-economic development in Singapore.

Discussion

Higher education in Singapore, with a strong and supportive role played by the developmental state, has experienced considerable changes over the past two decades. It witnessed the steady and incremental massification process taking place in the higher education system, in which new universities were set up on the basis of partnership with overseas well-established universities and some are more practical-oriented with more emphasis on applied research which is more relevant to Singapore's public policies, society and economy. Universities are also encouraged to play a more important role in undertaking R&D activities to help Singapore develop new niche areas ahead of other countries such as biomedical and sustainable food industries. The process of internationalisation was carried out not only to increase the number of foreign students studying in Singapore but also to get more overseas universities into Singapore for partnering with local universities or setting up their own offshore campuses. The collaboration between Singapore and overseas universities has proved effective in boosting the international standing of Singapore's higher education. However, controversy over academic freedom would be stirred up occasionally when Singapore tried to forge collaboration with world-class universities especially in the fields of humanities and social sciences. The most remarkable example is the Yale-NUS collaboration which aroused concerns among humanities and social sciences scholars in Yale University that they questioned the viability and sustainability of the joint liberal arts college to be set up

with NUS, which is now known as Yale-NUS College, as academic freedom in Singapore was believed to be limited and constrained by the Singapore's laws that academic exchanges and publications would not be completely free.

While the use of international rankings is considered a key indicator to show how well universities can perform in comparison with other counterparts around the world, it is even more important for universities to strike the right balance between pursuing global rankings and serving the interests of nation-building and socio-economic development. It is widely expected that the six publicly-funded autonomous universities in Singapore can make significant contributions to the well-being of society and economy instead of just over-emphasising their ranks and positions in various ranking exercises. Therefore, while considering higher education as a means of promoting upward social mobility, in line with the principle of meritocracy, it is also important for ensuring equal opportunity for students regardless of their socio-economic status to receive higher education. Social well-being remains much more important than top ranks for universities to accomplish after all.

Conclusion

As argued above, these issues related to higher education development must not be unique for Singapore but can also be easily found in many other countries. Singapore's higher education development model, up to this point, has proved to be viable though not the most impressive, as compared with the very top universities in the United States and Europe. The achievements attained by Singapore's universities are magnificent as compared with most Asian counterparts for NUS and NTU has been capturing the top ranks in Asia since the late 2010s till nowadays. There are few states that have made the Third World to First World transition in such an impressive manner as what Singapore experienced. Few other countries would have given such centrality to education, training and R&D as what Singapore had committed to. Singapore has shown remarkable resilience in meeting and overcoming challenges so that the island-state can survive till now in such a region full of uncertainties and turbulence. The new phase of economic and human capital growth, in addition to various waves of disruption caused by globalisation and disruption, will test the capacity of Singapore's developmental state to meet even more changes and challenges to come during the post-pandemic era when it will need to address new norms of geopolitics and geoeconomics shaping the future of Singapore.

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Chapter 7
Diversity and Global Citizenship in Educational Policies: Debates and Prospects

Kathrine Maleq and Abdeljalil Akkari

Abstract This chapter examines how social and political contexts have influenced the definition and operationalization of citizenship education and multicultural education in curricula and address the debates surrounding GCE in culturally diverse societies. In nation-states characterized by diversity, there have been calls for a renewed focus on forms of civic education which promote national belonging and loyalty; such calls often target, either explicitly or implicitly, students from minority or migration backgrounds. An apparent binary is established, between those who see the primary purpose of citizenship education as nation-building, and those who want to promote global solidarity (Osler, J Curric Stud 43(1): 1–24, 2011, p. 2). The challenge for GCE is therefore to strike a balance between local, national and global belonging that ensures both national cohesion and a sense of global responsibility. We conclude by proposing that Global citizenship be taught through youth engagement which is connected with skills such as creativity, critical thinking, communication skills and citizenship skills.

Diversity and Global Citizenship in Educational Policies: Introduction

Since the beginning of the twenty-first century, citizenship education has stimulated interest at both national and international levels (Banks, 2009), especially in nation-states characterized by diversity (Osler, 2011). However, deep societal changes resulting from globalization along with increased cultural and ethnic diversity are reshaping traditional models of civic identity, and as a result are increasing focus on

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alternative, cosmopolitan, global and multicultural identity models (Zajda & Majhanovich, 2021). In addition, the expansion of ICT (information and communication technology) has facilitated the creation of international networks and communities with shared interests and concerns, reinforcing a feeling of belonging to a global community, creating for some social groups a sense of world citizenship identity and fostering a civic engagement in global issues. In this context, the concept of Global Citizenship Education (GCE) seems increasingly relevant to contemporary educational systems, although the ideological tensions that underlie its different approaches render it a source of contestation.

A History of Citizenship Education

What it means to be a citizen has been shifting for nearly two centuries as many countries experience growing diversity and decolonialization. Citizenship education, in contrast, remains mostly nation-centric with little acknowledgement to the world's interconnection or to how local views are linked and interdependent to a global worldview. In keeping with its historical tradition, citizenship curricula have been primarily focused on developing a national identity and allegiance as well as knowledge of political institutions with the Nation-State.

Historically, public schooling focused on building national identity by teaching a national language, civic values, and national history. This process inevitably enabled the elites to retain control over cultural and ideological narratives by shaping the minds of future societies (Osborne, 2000). As such, citizenship education is best described by an act of assimilating minorities into the dominant culture (Banks, 2008, 2009).

Traditional conceptions of citizenship have however evolved under the influence of globalization, migration flows, international treaties and frameworks for international human rights protection (Zajda, 2020). The expansion of ICT (information and communications technology) has, for its part, facilitated the creation of international networks and communities who share similar interests and concerns (Sassen, 2002). These trends have created a sense of world citizenship identity and a sense of belonging to a global community as well as opportunities for civic engagement in global issues. Climate change and other sustainability challenges have proven that global issues cannot uniquely be addressed by actions within national borders. Finally, demographic changes such as increasing diversity experienced in many countries has also shaped this evolution. As a result, traditional national-centric models of citizenship education no longer reflect today's changing realities (Castles & Davidson, 2000).

A willingness open citizenship education's references to a wider community can to some extent be seen in European states such as France and England. In France, although citizenship education remains largely national-centric, references to the larger European community have been gradually added since the 1980s (Legris, 2010; Ménard, 2017) and debates are ongoing regarding the importance given to an

overreaching value of universality, strongly rooted in the French Republican tradition and the growing need to recognize the cultural diversity of students, especially in underprivileged suburbs (Legris, 2010). However, in the aftermath of the terrorist attacks committed in the country in 2015, the fostering of 'French Republican Values' and the defense of principles of secularism became one again central in educational policy, with the assumption that it would help build national unity and combat radicalism (Chauvigné, 2018). In other words, citizenship education shifted back to a more national-centric approach. Nevertheless, the practical applications of the principle of secularism, such as the prohibition of wearing of headscarves in schools and public institutions, remain widely debated and a source of tension (Diallo et al., 2016). In addition, addressing citizenship without awareness that a significant number of French youth who have cultural roots from former French colonies may not share the national narrative about France's colonial past or the national citizenship paradigm presents a problem.

In England, citizenship education has also become a much-debated political issue since its introduction in the National Curriculum. In response to the outburst of racial tensions in Northern England in 2001 followed by the terrorist attack in London in 2005, Ajegbo et al. (2007) published the Diversity and Citizenship Curriculum Review that gave impetus to teaching about diversity (Davies & Chong, 2016). The National Curriculum guidelines published the following year "advocated a global and multicultural dimension which incorporated to a limited extent the notion of a European dimension" (Faas, 2011, p. 488). In 2014, a new policy shift took place, adopting a more conservative approach to citizenship education that included the promotion of 'Fundamental British Values' of democracy, rule of law, individual liberty, mutual respect and tolerance for those of different faiths and beliefs (Department for Education 2014). As part of the anti-radicalization 'Prevent Strategy' (Starkey, 2018), this new approach to citizenship education also places a strong focus on character education (Davies & Chong, 2016). In this tense political context, "the constitution of British-ness has been an increasingly visible part of the political discourse throughout this century, in response to concerns about population movements, integration of minorities, cohesion and terrorism" (Vincent, 2019, p. 17).

Overall, the debates about citizenship education in schools can be seen as a microcosm of the broader debates about citizenship in society (Kerr, 2003) and political agendas have direct implications for educational policy (Wilkins & Olmedo, 2018). Growing diversity in many countries has given rise to questions about the definition, purpose, and intended outcomes of citizenship education and has encouraged "debate about the meaning of nationality, national identity and citizenship and the extent to which individuals and groups from both majority and minority communities feel a sense of belonging to the nation and State" (Osler & Starkey, 2006, p. 288). Consequently, we can see that these debates have intensified in countries such as France and England in which the governments are turning towards citizenship education as a means to fight against terrorism and radicalization. However, this has generated controversy and questions have been raised concerning the risk of intensifying "processes of 'othering' through the

marginalisation and degradation of minority groups and communities (in this case young Muslims)" (Bamber et al., 2018, p. 437).

Overall, these recent policy shifts illustrate that approaches to citizenship education are closely linked to their historical and political national contexts. As suggested by Osborne (2005) "historical struggles and political debates over its meaning have made citizenship an arena where competing interests and philosophies contend, to the point that one might reasonably claim that the essence of citizenship is to be found in the continuing debate over what it means to be a citizen" (p. 13). Citizenship education has its roots in the need to consolidate national identity (Osler & Starkey, 2001) but needs to evolve to meet the challenges of multicultural societies. However, the challenge to find a balance between the desire to build national unity and growing demands to promote and recognize cultural pluralism inevitably creates tensions connected to the design of citizenship education curricula. Indeed, citizenship education approaches in multicultural societies still strive to strike a balance between local, national and global belonging that ensure both national unity and a sense of global responsibility. In this respect, global citizenship may provide an opportunity to value multiple identities and cultural diversity and build competences to navigate cultural differences.

Furthermore, in culturally diverse countries, there is a need to strengthen a culture of inclusive and participatory democracy by not only including citizens from all cultural, ethnic, linguistic and religious backgrounds, but also by making sure this diversity is reflected in state-run institutions and political representative bodies.

The challenge resides in how to create nation-states that recognize and incorporate the diversity of their citizens, but also embrace an overarching set of shared values, ideals, and goals to which all citizens are committed. A nation-state can only secure the liberties of cultural, ethnic, language, and religious groups and enable them to experience freedom, justice, and peace by unifying its citizens around a set of democratic values such as human rights, justice, and equality. Educating citizens to understand this unity-diversity tension and act accordingly is therefore crucial (Banks et al., 2005, p. 7).

The Crisis of Multicultural Education

Both through civil rights movements and international migration, schools started in the 60s and 70s to hear the voices of cultural and ethnic differences and have been endorsing a multiculturalism approach, with a focus on embracing cultural diversity. Multiculturalism seeks to highlight differences among groups in positive ways. As it most often takes an apolitical and ahistorical stance, the focus is generally on celebration of diversity and an assumption of an egalitarian society where all groups are treated equally (Kishimoto, 2018). While this approach seeks to promote empathy and tolerance, it has suffered from many shortcomings. Indeed, many authors point out that educational strategies that primarily focus on celebrating culture run the risk of creating a "us" versus "them" binaries, de-politicizing racism discourse,

as well as reinforcing harmful power structures and the continual centering of White experience (Bedard, 2000; Eidoo et al., 2011; Kishimoto, 2018; Raby, 2004).

In practice, we can therefore see that schools often limit multicultural education to activities aimed at celebrating cultural diversity and recognizing the ethnic and cultural heritage of students and their families. Although these activities are often portrayed as a vehicle for cultural inclusion, they generally fail to develop a deeper understanding of cultural complexities and dominance relationships (Watkins & Noble, 2019). By showcasing essentialized representations of cultures, they "rest on a kind of simple moralism that resists intellectual scrutiny: a moralism that suggests the primary lesson is to be nice" (Watkins & Noble, 2019, p.297). This "feel good" approaches to ethnic and cultural diversity seem to have become the favored approach in schools, overshadowing other educational aspects of multicultural education and failing to incorporate a critical understanding of multicultural issues. In this respect, Walking and Nobel (2019) caution that:

> A multiculturalism that emphasizes feeling good is primarily concerned with moral rules of engagement, of doing and saying what is culturally appropriate, as if one could arrive at a checklist of 'dos and don'ts' for each group. Of course, multiculturalism has operated in this way and it is an approach that has influenced multicultural education (p. 299).

Furthermore, celebrating cultural diversity as a "demographic fact" is solely based on the premise that ethnic diversity is in itself an added value. Whilst it is important to work with students and teachers on cultural diversity, it is also important encourage them to reflect on their responsibilities, rights and privileges in a global interconnected world, beyond their national belongings/borders (Akkari & Maleq, 2021).

We argue that linking multicultural education and citizenship education under the umbrella of GCE could help students understand the interconnections between issues related to citizenship, democracy, participation, multiple and fluid identity, ambiguity, diversity, social justice, global issues and sustainability. Schools are faced with the challenge to educate youth to imagine creative solutions to existing global issues and future challenges. In this sense, global citizenship may provide an opportunity to value multiple identities and cultural diversity, build understanding of root causes of global issues of inequality and discrimination and help create a fairer, more sustainable and just global society.

Overall, there is a need to rethink dominant approaches to multicultural education in order to:

- Propose a wider definition of culture that transcends national, ethnic and religious boundaries
- Move beyond essentialized cultural celebration activities
- Critically challenge the cultural deficit theory
- Value hybrid, cross-border and fluid forms of cultural identify
- View tolerance to ambiguity and the ability to cross cultural boundaries as key aspects of multicultural education
- Develop a critical understanding of global power dynamics and roots of global inequality.

We believe it is high time to change the citizenship paradigm that is based on the premise that individuals should be committed and faithful to one Nation and one passport. Today's youth, especially in urban cities, need to develop adaptive and transnational skills.

Global Citizenship in Multicultural Contexts

In today's globalized and interconnected world, global citizenship education (GCE) has been identified as a means to prepare youth for an alternative, inclusive and sustainable world. Consequently, schools have a fundamental role to play in empowering learners to become responsible and active global citizens. In recent years, GCE has become a strong policy focus in international agendas, in particular in the 2030 Agenda for Sustainable Development adopted at the United Nations Sustainable Development Summit in September 2015. By drawing attention to the pressing need to foster global citizens, GCE aims to empower learners to act responsively towards global issues and promote a more peaceful, inclusive and sustainable societies. Closely linked to human rights, it conveys values of respect, diversity, tolerance and solidarity (UNESCO, 2015).

There is however a lack of consensus regarding this concept and the values it embodies. Subject to divergent viewpoints and political stances, GCE may be seen as stuck in two contrasting global trends: on one side, post-national forms of identity have gained more momentum in increasingly interconnected, interdependent and culturally diverse contexts and on the other side, populism, nationalism, ethnic conflicts and religious extremism are rising around the world. Furthermore, many countries of immigration are faced with growing hostility towards globalization, multiculturalism and its values (Akkari & Maleq, 2020).

Indeed, many OECD countries are experiencing what could be described as a multilevel crisis of multiculturalism (Chin, 2019). First, a growing number of politicians, not only those from the far-right wing, challenge the efficiency, validity or the added value of multicultural policies. Furthermore, the fight against Islamic extremism is often utilized to discredit multiculturalist and immigration policies. Second, many countries still experience school segregation linked to residential segregation of ethnic minorities and migrants, resulting in ethnic tensions and aggravated inequalities.

Within this context, GCE it is subject to divergent political and ideological views despite being put forward as a means of building competence for a democratic and inclusive society. In the current political climate marked by growing divides on questions relating to immigration and multiculturalism (Tarozzi & Torres, 2016), tensions and opposing viewpoints are rising between those who believe the primary purpose of citizenship education is to build national identity and those who seek to promote global citizenship and solidarity.

It is clear that citizenship education is highly politicized and very much determined by the nature of national political agendas. It is therefore no surprise that the

introduction of a concept like 'global citizenship' in international education discourse is met with mixed feelings divergent understandings.

Nevertheless, in response to a growing need to prepare students for a rapidly changing global world, we can observe that GCE related content has gradually been introduced in national curricula (Akkari & Maleq, 2020). In the European context, Ross and Davies (2018) identify four significant trends of global citizenship: (1) developmental citizenship; (2) global environment issues; (3) universal human rights (4) global identities. Goren and Yemini's (2017) study has also shown that, worldwide, educators and policymakers increasingly seek to integrate GCE, in a bid to "prepare students to navigate and thrive in a modern global society" (p. 170). However, although GCE aims to provide answers to today's global challenges, foster social change and empower global citizenship, its operationalization and implementation at national levels proves to be challenging. Many authors also point out that many policy makers, teacher trainers and teachers seem to have limited understanding of GCE's possibilities (Alazmi, 2021; Bourn et al., 2017; Myers & Rivero, 2020; Rapoport, 2010).

Indeed, despite the concept's universal reach, GCE is largely context-dependent and subject to many interpretations. Within the multitude of definitions and approaches to GCE, Dill (2013) suggests that there are two main approaches to GCE: (1) a global competencies approach, aiming to develop the skills needed to compete in a global world and (2) a global consciousness approach, based on humanist values. For his part, Veugelers (2011) identifies three categories of global citizenship: (1) open global citizenship, which recognizes the interdependence between nation states in the globalized age; (2) moral global citizenship, based on human rights and equality, which emphasizes global responsibilities; and (3) sociopolitical global citizenship, which seeks to rebalance political power and promote equality and cultural diversity. As you can see, Veugelers' categories are hierarchical, with open global citizenship representing a shallow form of GCE and sociopolitical global citizenship representing a more profound approach.

Broadly, global citizenship has been defined as "awareness, caring, and embracing cultural diversity, while promoting social justice and sustainability, coupled with responsibility to act" (Pierce et al., 2010, p. 167). As stated previously, the fundamental spirit of global citizenship education is learning to live together. It promotes respect for diversity and solidarity for humanity and can be practiced not only globally, but also locally. In this respect, providing students with opportunities to learn about such fundamental values such as non-discrimination and non-violence is a good starting point for global citizenship education. For example, teaching students to treat immigrant and migrant children present in the local community with respect and dignity is a valid action for global citizenship education, as much as teaching them to learn about cultures outside their national borders (UNESCO, 2016).

Evans et al. (2009) also point out that teaching global citizenship has been informed by traditional citizenship education and has adopted its five main themes: awareness of related concepts; identification with civic communities; understanding of civil, political, socioeconomic, and cultural rights; individual reflexivity regarding

citizen thinking; and identification with values that lead to citizenship engagement. From a national perspective, Osborne (2000) suggests that citizenship education involves seven main elements: a sense of identity, awareness of and respect for the rights of others, the fulfillment of duties, political literacy, critical acceptance of social values, personal reflection on these components and necessary academic skills. While there is a general agreement that it is essential to educate youth about citizenship, there is an ongoing disagreement regarding how citizenship should be taught within the education system.

It is important to emphasize that, as GCE finds its place in school curricula alongside more traditional national-centric citizenship education, it may encounter similar challenges. As current models of citizenship education are moving away from knowledge-based approaches, the complexity of its objectives call for a more transversal integration. However, despite the many opportunities of transversal integration, it requires improvements in teacher training (Tsankov, 2017). Furthermore, more research is needed to effectively translate the intentions of empowering students to become active and responsible citizens in the school context.

Finally, the biggest challenge for GCE may be to avoid becoming dogmatic and overcome normative discourse. Eidoo et al. (2011) argue that since GCE is strongly linked to a multicultural education, it may be susceptible to similar critiques, whereby a superficial focus on the similarities of individuals can ignore realities of power dynamics and oppression as well as support an underlying neoliberal, Eurocentric bias (Andreotti, 2014; Eidoo et al., 2011; Hartung, 2017). However, critical models of GCE may provide an opportunity to rethink multicultural approaches to education and build a more complex understanding of settlement, immigration and pluralistic identities, by acknowledging and addressing the dynamics between marginalized and dominant cultures (Eidoo et al., 2011).

Beyond specific curricula components, GCE also requires appropriate educational pedagogies to develop world-mindedness, cross-cultural awareness, respect for the rights of others, and a social justice-oriented approach (Cook, 2008; Eidoo et al., 2011; Evans et al., 2009). Given the growing diversity in many countries, there is a need to acknowledge the complex intersections of race, ethnicity and culture, as well as the legacies of colonization and systemic injustices. In this respect, Andreotti (2014) invites us to reconsider traditional modals of citizenship defined by dominant Eurocentric groups that structure education systems and reflect their perspectives. Given the fact that GCE is generally taught within pre-existing subjects, such as social studies and civics, rather than existing as stand-alone course content (Rapoport, 2009) and lacks an explicit place in curriculum, the issue of appropriate educational pedagogies is even more important. In is however important to note that, since GCE is mostly unstructured in the curricula, it is highly dependent on the knowledge and dedication of individual teachers. In this respect, pre-service and in-service teacher training are key to the integration of GCE in schools.

Teaching Global Citizenship Through Youth Engagement

Learning democracy and citizenship has always been a central concern of pedagogues and educational thinkers. To mention only two of the most influential authors, Dewey and Freinet, their respective work provides a relevant insight into teaching citizenship. For Dewey, democracy is an experimentation that is constantly challenged - not a dogmatic or institutional order (Dewey, 2018, 1998). According to Freinet (1946), cooperative classes are based on a pedagogy of learning through experimental trial and error as well as freedom, responsibility, rights and obligations within a local and global community. Freinet's pedagogy is based on principles of mutual aid, solidarity, autonomy, cooperation (realization of common projects defined together as well as personal projects). The active involvement of learners in civic actions will allow them to develop practical experience and gain an understanding of GCE, since the latter "can be learned, but above all it can be practiced".

Culturally Responsive Pedagogy, which focuses on both acknowledging and considering the complexities of student diversity and integrating students' prior knowledge and experience into the classroom (Gay, 2000; Ladson-Billings, 1995), may also constitute a pedagogical approach worth exploring in relation to GCE. Allowing students to view themselves as valuable contributors to their communities and actively promoting student empowerment by encouraging them to draw on their own experiences and culture to foster positive environments (Grant & Asimeng-Boahene, 2006; Ladson-Billings, 1995), Culturally Responsive Pedagogy's approach has a social justice-oriented standpoint and is closely linked to GCE.

We argue that the most effective approach to GCE is through youth engagement and the involvement of young people in their institutions, communities and decisions. By focusing on youth engagement, GCE could help youth to be perceived as responsible and informed democratic members of the world who can actively contribute to the social and political arenas in which they have been typically excluded (Hartung, 2017). This may enable young people to see themselves as agents of change and open opportunities to develop competencies and encourage young people to seek involvement (Bulling et al., 2013). Furthermore, this approach may increase youths' sense of community and allow young people to act as agents of change, positively impacting both themselves and community development (Checkoway & Gutiérrez, 2006; Perkins et al., 2001; Zeldin et al., 2013). With an increasing willingness from youth to engaging in unconventional forms of civic participation and engage in environmental activism, schools need to adapt their approach to civics and citizenship education. In our technology-laden modern world, social media plays a significant role in extending the impact of social movements, allowing the creation of support networks and giving a platform to get non-dominant voices into the discussion (Mundt et al., 2018). For instance, Mundt et al.'s (2018) case study on Black Lives Matter highlights the potential of social medial for building connections, mobilizing participants and amplifying alternative narratives.

Conclusion

In this chapter we have highlighted the current pedagogical challenges and opportunities for GCE. Probably the most important challenge to overcome is the conceptual fuzziness around the concept of GCE along with conflicting perspectives that range from neoliberal conformism to radical and critical proposals. In terms of opportunities and pedagogical potential, GCE could help redefine multicultural education by situating it in the global context and connecting it to the imperatives of sustainable development. In today's globalized and interconnected world, the greatest limitation of multicultural education is its national framework. Whilst it is important to work with students and teachers on cultural diversity, it is also important to encourage them to reflect on their responsibilities, rights and privileges in a global interconnected world, beyond their national belongings/borders. Finally, there is an urgent need to bring the concept of GCE to life, through the engagement of youth and their involvement in educational institutions. It is therefore not only a question of learning about global citizenship, but also of practicing it on a daily basis.

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Chapter 8
Neriage as Japanese Craft Pedagogy: Cultural Scripts of Teaching That Promote Authentic Learning

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Abstract The aim of this study is to elucidate the *neriage*-based teaching script shared by Japanese teachers as tacit knowledge and to visualize (where visualization means to bring a focal awareness to) the ethos and understanding that supports this, through analysis of three case-based studies of mathematics lessons from different time periods.

The first case-based study/analysis is of a lesson – *how many acorns did we pick up?* – in which each child tackles the learning task and problem solving individually (1966, City T.). The second case-based study/analysis is a lesson – *how would you find the grassy area?* – in which children's ideas are compared (1996, City N.). The third cased-based study/analysis is a lesson – *how much did it all cost?*- that utilizes the diversity of children's ideas (2014, City K.). The authors examine critically the aspects of *neriage* that have changed over time in relation to the global world pedagogical trends and those that have not as Japanese pedagogical perspective, and discusses the teaching script (the visible structure) present in the lessons, and the ethos (the invisible mindset, such as the philosophy, attitude, beliefs etc.) behind it.

Keywords Authentic learning · Collaborative learning · Critical thinking · Deep thinking · Dialogic teaching · Japan · Japanese teachers · Mathematics lessons · Neriage · Neriage-based teaching script

Introduction

Neriage as Japanese craft pedagogy is a lesson script process whereby children present to each other the methods they have found for solving a problem and refine their ideas as a group. Inoue and his colleagues had realized the culture and nature of

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neriage in the context of teaching as, "[*neri*] means eliciting students' critical and deep thinking in a problem solving, [*age*] means bringing students toward achieving the lesson goal or sub-goal"(Inoue et al., 2019, p.371). Here, craft refers to a set of technical operations (skills) that transcends context or, more specifically, "a particular knowledge form which constitutes skill" (Gamble, 2001, p.186). Authentic learning mentions student abilities to engage in disciplined inquiry into meaningful problems, higher order thinking and complex problem solving (Saye et al., 2018, p.865).

The authors used Shigematsu's observation, comments, analysis and dialogues with the teacher of the first case-study (Shigematsu, 1971, pp.47–56), and Sarkar Arani's analysis of the lesson for the second case-study (Sarkar Arani, 1999, pp.132–145 and pp.309–318). The data of the third case-study originality came from the authors' research project of a school-university research partnership to do lesson study from 2014 to 2016 academic year. Each of these case-based studies/ analysis lessons sought to implement *neriage*, but the time period in which they were conducted and the way each unfolded differed.

Viewing Neriage from the Global World Pedagogical Trends

Several insights are provided by prior global pedagogy literature regarding concrete strategies for improving lesson plans, practices and understandings. Firstly, encourage intellectual challenge for developing understandings of learners and learning. It means teachers and children should be encouraged to challenge themselves intellectually in order to develop their understanding about learning (Feiman-Nemser, 2012).

Secondly, teachers should do research on teaching materials to help them preempt children's thinking and provide open-ended questions and in-depth problem as learning task (Lewis et al., 2011; Sarkar Arani, 2017). Researchers also should change their landscape of inquiry on teaching which means focus more on evidence-base analysis to understand the culture of the present, a culture of doing, of practice, that needs to our laboratory as well as methods (Zajda, 2020). As Friedman notes "research *in* practice, not research *on* practice" (Friedman, 2006, p.132).

Thirdly, expanding collaborative learning as an approach of teaching that is built on philosophical positions like Dewey, Vygotsky, and Habermas, which assert that "knowledge is socially constructed within a community of learners" and as Vygotsky argues "thinking is internalized conversation"(Innes, 2004, pp.173 & 196). It means authentic and meaningful learning should be expanded through the use of dialogical lessons that allow dialogue with others and internal dialogue to complement each other (Innes, 2004).

Fourthly, fostering communities of teachers as learners that means "an accomplished teacher is a member of a professional community who is ready (possessing vision), willing (having motivation), and able (both knowing and being able 'to do')

to teach and to learn from his or her teaching experiences (reflective), and acting as a member of a professional community (communal)" (Shulman & Shulman, 2004, p.259).

Finally, building a school culture that encourages effective teaching and learning through changing mental model of policy makers, curriculum developers, principals and teachers about quality of teacher and teaching that "changing the people without changing the context in which they work is not likely to substantially improve the school" [and quality of teaching and learning] (Johnson, 2012, p.107). As Stigler and Hiebert noted "much of what happens in the classroom is determined by a cultural code that functions, in some ways, like the DNA of teaching. That's why changing teachers will not automatically produce changes in teaching" (Stigler & Hiebert, 2009, p.12). Johnson also illustrates, "individuals cannot be supported or their talents sufficiently nurtured if the school itself does not change from a collection of independent classrooms to an interdependent organization in which individuals routinely contribute to others' improvement" (Johnson, 2012, p.119). It means for better teaching it is necessary to focus more on teaching rather than teachers-the belief that good is achieved by getting the right people into the classroom and right teachers can magically improve students' learning should be changed.

Reviewing Neriage from Japanese Pedagogical Perspective

The categories of dialogic teaching and authentic learning are umbrella concepts; they do not represent specific teaching methods in practice. Lessons are created through the craft pedagogy devised by teachers. In case of Japanese *neriage*, it means comparison and discussion by students follows problem solving. Japanese pedagogy has required teachers to generate deep learning by developing collaborative learning based on the diverse ideas of children (Inoue et al., 2019). Even within the context of mathematics, lessons are created utilizing this diversity of ideas (Koto/ Nigata Sansukyoiku Kenkyukai, 1991).

Having children provide a range of opinions does not automatically lead to deep learning. Above all, what is desirable is for there to be a 'seed' embedded within the teaching material that develops through the problem children are trying to solve, having the teacher discover (or create) that problem solving seed within the teaching materials, and having children discover that seed and take an interest in it. This is dependent on the existence of active learning through dialogue, which occurs when children take an interest in the learning content, think for themselves, and construct a shared critical awareness or shared problem around the task they are pursuing in the classroom (Inagaki et al., 1998).

The 'deep and authentic learning' that occurs in the classroom is characterized by the formation of 'living knowledge'. This means using dialogue with others who have a range of perspectives and ways of thinking to notice the connections between different phenomena, and integrate and situate these discoveries in one's body of

knowledge (i.e. conceptual and procedural) so as to be able to apply this knowledge when encountering similarly constituted situations in the future (Mizuno, 2013).

Therefore, the focus of lesson planning going forward will likely be not only how to draw out the diverse ideas of children in the classroom, but how to forge connections between the diverse ideas the children contribute and use these to build new meaning. It is important for teachers and children to share this vision for the creative classroom, and for teachers to nurture in children a healthy thirst for learning based on an awareness of what they want to learn.

Japanese pedagogy, and that for elementary school learning in particular, traditionally places emphasis on lessons where children discover the problem and everyone solves it together. That is, these lessons tend to share a teaching script whereby children and teachers build the lesson together, by drawing out a range of ideas, discussing and evaluating each other's opinions, and facilitating a deep discussion that satisfies all involved. At an organizational level, teachers in each school also discuss and evaluate each other's lessons. To teachers, it is important to maintain a spirit of encouraging children to think about '*why*', promoting shared ownership not just of what is understood but also what is not, taking care of children's feelings by not discarding their ideas, enjoying interacting with children in the class, and striving to realize children's current desires and future ambitions.

How Many Acorns Did We Pick Up?

A Lesson in Which Each Child Tackles the Problem Individually

This mathematics lesson took place on October 14, 1966, with Third Grade Class no. 4 at Elementary School T, located in City T., and the topic was expressions and calculation. The learning task was written on the blackboard as follows.

> "4 of us picked up acorns together. Of the acorns we picked up, 17 were rotten, so we threw them away. When we divided the rest among the 4 of us equally, each person had 9 acorns. How many acorns did we pick up?"

Each year Elementary School T held a two-month long event where teachers observe each other in open lessons, the so-called lesson study. This lesson was conducted during this period and was observed by the principal, the head and deputy head of teacher research and development, researchers and members of the mathematics group. Teacher K, who taught the lesson, transcribed the lesson themselves based on an audio recording. Appendix 1 provides a summary of the process of the lesson with the boundaries of each part indicated by numbers from the lesson transcript (Shigematsu, 1971, pp.47–56).

The Lesson Analysis and Findings

Turning the Learning Task into the Children's Inquiry

As Shigematsu's illustrates, "Teacher K made sure to value each child's remarks and the perspectives and ideas behind them" (Shigematsu, 1971, p.55). The children understood the learning task for the lesson and considered its solution through dialogue. After moving around the class observing the children's work, the teacher selected 3 children, Eto (board work-*bansho*-, left: '9×4=36 A[the answer is] 36 acorns'), Watabe (board work, center: '4×9=36 36−17=19 A[the answer is] 19 acorns'), and Oda (board work, right: '9×4=36 36+17=53 A[the answer is]53 acorns') and called up them to write each of the methods they had come up with for solving the problem on the board. With an idea of the way she wanted the lesson to progress, teacher K asked Eto to present his idea. She established dialogic learning by turning the lesson's learning task into an enquiry for the children, and using the blackboard as an effective tool to visualize the children's thinking. Eto14 told the class that 'There were 9 acorns each when they divided them between 4 people, so 9 times 4 is 36.' In response, the children said things like, 'I have an idea, I have a question, that's not right. . .' However, Soejima24 agreed with Eto, adding 'If they were picking up the acorns in a basket, then they threw away the rotten ones, so we don't include them in the number of acorns they picked up, right?' It was then that the teacher26 asked, 'Soejima is saying that we don't include the thrown away acorns in the number picked up, and others are saying that's not right. Who agrees with Soejima?' After allowing Sudo and Matsuda, who agreed with Eto and Soejima, sufficient opportunity to voice their opinions, she summarized and posed the following question to the children (Shigematsu, 1971, pp.41–51).

Teacher35 'I see, Soejima is saying that he would have only picked up the acorns that he could use, and Matsuda and Sudo are saying that if while you're picking them up you think 'oh this one is rotten' and throw it away as you go along, then the answer is 36. How did they pick up the acorns in this problem?' Kuno37 then comments by linking the text of the problem with their own experience: 'It says they picked up the rotten ones together. Because it says "Of the acorns we picked up, 17 were rotten, so we threw them away," so they looked at them later and realized they were rotten, then threw them away.'

What provided the opportunity for the children's thinking to develop was the teacher's35 question that had them visualize the situation: 'How did they pick up the acorns in this problem?' By visualizing the act of acorn collecting in a concrete manner, the children were able to realize that the difference between the solutions was due to a difference in the way the acorns were being collected. Clarifying how the action actually took place was the key to the children understanding the essence of the shared problem that they were investigating. Underlying Matsuda27's group's stance is their imagining that the acorns were thrown away as they were being collected. It is imagining this anew that corrects their understanding. The basket that Oda39 drew on the board as they explained to the class, and which did not appear in

the problem text, resulted from their attempt to provide the class with a concrete display of their image of all the acorns being picked up without any being thrown away (Shigematsu, 1971, pp.51–52).

After listening carefully, Soejima40 mumbled, 'Ah yes, that's right after all.' Listening to different opinions, he examined his own thinking and realized the mistake within it. Then Soejima44 comments, 'It was. I. . . . I was thinking of when I pick up acorns. But adding the 17 is correct. In this problem, you add the 17 after all. . .' There the teacher asks Sudo and Matsuda, who expressed similar views to Eto and Soejima, whether they had changed their minds too. It seems that what enabled Eto, Soejima, Sudo, and Matsuda to stand their ground before being convinced and admitting they were wrong, was the teacher's efforts to consider and value each of the students' comments and the thinking behind them (Shigematsu, 1971, pp.52–53).

Creating Mathematical Concepts

The teacher50 praised the children, saying, 'I'm glad you all got it,' and asked 'Ok, What about Watabe's method ($4\times9=36$ $36-17=19$ A[the answer is]19 acorns)?' calling on Soejima. Soejima53 responded, '9×4 and 4×9 mean different things. There are two possibilities – 4 lots of 9 and 9 lots of 4. I think 9×4 is better.' After listening to the opinions of other children, the teacher58 summarized, 'Yes, because there were 4 people who each received 9 acorns, weren't there?' and added in red on the blackboard '$9 \times 4 = 36$'. Then Soejima59 further commented, 'Well that's, Watabe put $36-17=19$, but, well, I think, because they said they threw some away, so, that's why they've put $36-17=19$. But, just then, we said that the thrown away ones are included, so it's 39+17, right?' It is likely that Teacher K offered Soejima the opportunity to interpret and critique Watabe's solution in order to regain some pride. Watabe65 commented, 'I realized that just now.' Watabe too listened to different opinions and realized the mistake in their thinking. By commenting 'we might accidentally think that because they threw them away, we should subtract them, mightn't we? So we need to think very carefully about the problem,' the teacher67 kindly recognized Watabe's error as an easily mistaken calculation, and added in red on the board, '$36 + 17 = 53$'. The teacher68 then asked, 'If that's the case, the correct answer out of these is?' and drew a circle around Oda's calculation written on the right hand side of the board. She then asked the children, 'Are there no errors in Oda's answer?' and they responded 'No. It's correct.' The teacher70 praised the children's hard work with 'Thanks to the way we all thought about it together, we finally found out the correct answer,' and asked Watabe, 'Yes. Watabe, even you realized your own mistake during the lesson, didn't you?' to which Watabe responded by nodding. Upon hearing the teacher's concluding remark, 'So, you've all done very well today,' the children grin (Shigematsu, 1971, pp.53–54).

The children visualized the act of picking up and throwing away acorns as though they were doing it themselves, and turned this into a mathematical question. The teacher had the children explain this formularization as best they could, using words

and drawings. When a clash of opinions arose in the learning activity, rather than resolving it herself, the teacher put this back to the children and used it as an opportunity to deepen the discussion. The teacher valued each child's feelings, and the children in the class actively worked to understand the ideas and feelings of each other and communicate their own ideas and feelings to their classmates. This is evident in the children's attitude as they seriously and sincerely evaluated Eto and Watabe's erroneous solution. Expressing the mathematical equation in their own words promotes children's conceptualization and allows them to take ownership of their mathematical understanding.

Leaving the children's equations on the blackboard, Teacher K added corrections in red based on the outcome of the group discussion. It appears that behind her decision to discuss last the thinking of Oda, who wrote the most appropriate solution on the board, was the intention to have the children overcome their difference in opinion, and properly understand the mathematical concept through the process of reaching a solution with which they could all be satisfied. However, no matter how well the teacher preempted the children's thinking and created multiple tracks for the lesson plan, there is always some difference between expectations and reality. Thus, teachers need to respond resourcefully to such unpredicted happenings in order to use them for the development of collaborative learning.

Shigematsu (1971) analyzed this lesson transcript and noted that, "in the class-room, teachers are constantly confronted with situations whereby their earnest preparation and careful planning proves insufficient, forcing them to improvise. How they have children overcome the clashes in thinking that generate such unanticipated situations is the key to teaching" (p.56). Here, importance is placed on 'overcoming' 'unanticipated situations' and 'clashes in thinking' within learning, and supporting this process of collaborative learning is the ethos behind it that we are talking about in this chapter.

How Would You Find the Grassy Area?

A Lesson in Which Children's Ideas Are Compared

This mathematics lesson took place on October 28, 1996 with Fifth Grade Class no. 2 at Elementary School K, located in City N., and the topic was Area of Figures. The learning task was written on the blackboard as follows.

> "We have a park that is a parallelogram (Fig. 8.1). Running through all this grass are straight roads. Now, the problem is asking what the area of the grassy bit is. The values aren't given. How would you find this [the grass] area?"

Fig. 8.1 The area of the grass
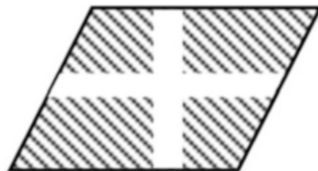
This lesson was an 'open lesson', observed by other teaching staff at the school. One of the authors of this chapter video recorded this lesson by Teacher I, and used this to create the lesson transcript. Appendix 2 provides a summary of the process of the lesson with the boundaries of each part indicated by numbers from the lesson transcript (Sarkar Arani, 1999, pp.132–145 and 309–318).

The Lesson Analysis and Findings

Setting an Mathematics Task to Promote Discussion

At the start of the lesson, Teacher I said to the children, 'Today, rather than refer to your textbooks, I would like you to refer to your own minds.' He ensured there was time for the children to consider the problem, and rather than allow the children to be satisfied by one method of answering it, tried to create space for children to have a variety of ideas. The children did not hesitate, but freely worked on the learning activity. The learning task is 'Two straight roads are running through the middle of a park that is a parallelogram (see Fig. 8.1). What is the total area of the grass without the roads (4 sections)?' No concrete values are given, and the children are asked to express the solution in words rather than as an equation. Provided 10 minutes to consider the task, the children search for a solution by coming up with various ideas, discussing amongst themselves, and at times asking the teacher for help. During the lesson, the inquiry proceeds with the teacher working within and between the children's groups (Sarkar Arani, 1999, pp.132–137).

The Teacher16 says 'Those who agree, come and put a sticker here,' and the children of the class came to the front to put sticker on the blackboard. The intention behind this was to clarify each of the children's opinions. Some children moved their sticker from one spot to another after hearing their classmates' ideas. The teacher88 also says, 'Those who don't understand, raise your hand. Those who don't get it, hands up. (Multiple children raise hands). OK, so, those who do get it, explain it to those who don't until they understand.' Through the discussion, the solution was eventually summarized into 4 different ideas as follows (Sarkar Arani, 1999, pp.137–145).

Solution I, Takahata35: Find the whole area of the parallelogram, and subtract the area of the roads (2 and 3).

Solution II, Oda51: Find the area of each of the 4 grassy sections, and add them together.

Solution III, Arakawa65: Remove the length of the roads and add the areas of each of the 4 sections.

Solution IV, Sasamoto83: Remove the road and join together the 4 grass sections, then use multiplication (length×width) to find the area of the rectangle.

A Teaching Process That Seeks Ideas from Each Child

Through mutual discussion, the children all understood the 4 methods for finding the area and were satisfied that they worked. Teacher I notified the children that in the next lesson they would find the area using the actual values, extending the children's motivation for learning to the next lesson as follows. Teacher I then considered that if the children were given the values from the outset, they would calculate the area and that would be it.

"T135: Let's find the answer in the next lesson. I'll give you the values then (Fig. 8.2)."

If we analyze the structure of this lesson from the perspective of *neriage*, then the following points emerge.

1. After first clarifying the learning task and ensuring the children had time to think about it, the teacher asks each child to come up with their ideas for the solution to the problem, the so-called seatwork which means providing opportunities for students to think and find solutions individually.
2. Children are divided into 2 groups: those who were able to come up with their own ideas, and those who did not understand what to do. The teacher gathers
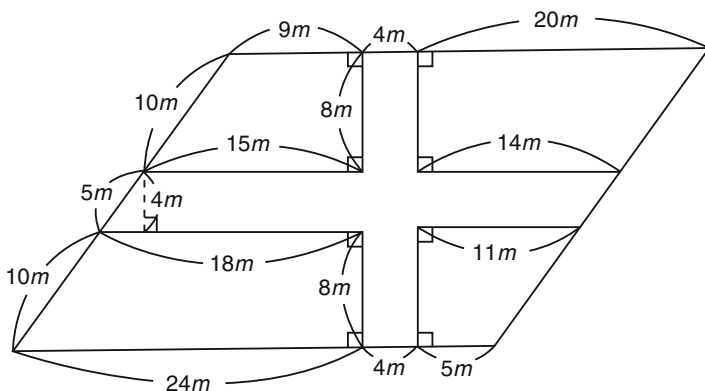
Fig. 8.2 The area of the grass (with values)

those who do not understand, finds out what the situation is, and motivates them to learn. In the end, 5 children are left in this group: Fujita, Nishikata, Tanizaki, Ohata, and Suzaki.

3. The children are asked to present their ideas for the solution. Children then stick a sticker with their name on it next to the solution that matches their own idea, enabling the visualization of the class's ideas.
4. The children are asked to evaluate the solution methods submitted, and think about which solutions they like or consider correct.
5. Children who have understood are asked to explain things to those who do not understand, until they can successfully understand.
6. The teacher calls upon each of the children who did not understand at the beginning (Fujita, Nishikata, Tanizaki, Ohata, and Suzaki) to check whether they have now understood (Sarkar Arani, 1999, pp.132–145).

Sarkar Arani (1999) analyzed this lesson transcript and noted that, "during the lesson, the teacher does not rush the children. Teacher I understands that teaching is complex work that takes time, and he gives many opportunities for the children to explain their own ideas and listen to the explanations of others" (p.156). Teacher I participated in an interview after the lesson, and said the following about what he had devised for the lesson: "In this lesson I drew out a variety of ideas by having the children stick their name stickers (on the blackboard) based on where they saw their own idea situated" (Sarkar Arani, 1999, p.158).

At the end of the lesson, Teacher I had the children write down their impressions. This provided an opportunity for them to reflect on how they had listened, how they had learned, and the outcomes of this. Having the children use their own words to form their ideas and linking this to the learning activity of the whole class led to deeper learning for the children. Years later, Teacher I describes his impressions about the lesson in an interview as follows,

> "In those days, teachers were enjoying interacting with the raw emotions of children. They were thinking about how to enjoy the lesson with the children. They waited with anticipation for what the children would say that day. They had a kind of naïve desire to make the children have fun and to shock them. That's a desire I think all teachers have, but perhaps we have lost sight of it in the busy day-to-day. I don't want to forget the joy of being a teacher that I felt in the beginning" (September 16, 2020, interview with Teacher I).

How Much Did it All Cost?

A Lesson That Utilizes the Diversity of Children's Ideas

This mathematics lesson took place on July 11, 2014 with Second Grade Class no. 1 at Elementary School S, located in City K., and the topic was Addition. The learning task was written on the blackboard as follows.

"We went to the candy store. Mita bought chocolate and rock candy. How much did it all cost?"

This lesson was an 'open lesson', attended by other teaching staff at the school, who observed each other's teaching, the so-called lesson study. The teacher's guide for this lesson was not developed solely by the teacher (Teacher X), but had been considered by the lesson study group of the school, and had been incorporated the views of the head and deputy head of teacher research and development and the school principal. One of the authors of this chapter video recorded the lesson by Teacher X, and transcribed the lesson based on the recording. Appendix 3 provides a summary of the process of the lesson with the boundaries of each part indicated by numbers from the lesson transcript.

The Lesson Analysis and Findings

Linking Children Discussion to Mathematical Content

At Elementary School S, language competency was being promoted. One of the aims of teacher research and development activities was to 'encourage independent mathematics learning in which children use equations, words and diagrams to express their ideas and communicate with each other', and demonstration lessons are also being conducted with this aim. In this lesson, the teacher[59] explained the flow of the lesson to the children. This can be summarized as follows.

1. Confirm what we are all going to learn today (presentation and ownership of learning task).
2. Think by yourself first (individual thinking).
3. Discuss in pairs (collaborative learning 1: pairs or groups).
4. Present ideas to everyone (collaborative learning 2: sharing with the group).
5. Summarize the learning and reflect.

In this way, the lesson was constructed as a typical active learning-style lesson (collaborative learning: think pair share). The teacher stuck pictures of chocolate (80 yen), rock candy (30 yen) and potato chips (40 yen) on the blackboard, creating the image of a shop. She displayed the words 'We went to the candy store. Mita bought chocolate and rock candy' on the board and had the children read them allowed and predict the problem that followed. The children answered 'How much did it cost all together?' Then the teacher revealed the lesson task by saying, 'Today we will work together to think how to do this calculation of 80+30.' She also asked, 'When we do the calculation, what do you think we should use to make it easier?' and after extracting Ohashi's[52] response 'Use a diagram', she wrote the learning aim on the board: 'Use money, diagrams, etc. to think about how to do the calculation.'

The teacher distributes '10 yen coins' that she has made out of card, and places importance on physical experience by vocally encouraging the children to touch the 'coins', use their voices, etc. as they consider the problem. The aim of the lesson was

to find a variety of calculation methods for working with units of 10 while utilizing semi-concrete objects (10 yen coins) and diagrams. However, having constructed the image of everyday shopping among the children, it perhaps was a shame that the teacher did not create some time for the children to play freely with combinations of candy and different total costs. As she designated the learning task 'How to calculate 80+30', rather than using diagrams to consider a variety of calculation methods, the task ended up becoming more about swiftly calculating the correct answer.

After thinking individually, the children are asked to discuss in pairs the ideas they have come up with, and to write down the methods they like in their notebooks. Here the teacher seeks to prepare the children to form ideas that they can convincingly teach to others, and to present these methods they have come up with to the class. The blackboard is utilized effectively as a tool to display and share each child's thought process in a visible way. In this lesson, the teacher chooses children to come to the front of the class and explain their ideas while manipulating the concrete objects-the '10 yen coins'. This is perhaps part of Japanese lesson culture. The children actively participate in the lesson and are quick to respond to the teacher's questions.

The first child chosen to present is Sato, who says, 'First, you draw a picture like this, and up to this line is 100 yen in total, and this left over 10 yen makes it 110 yen.' The teacher considers this, and then has Kubota confirm this idea by adding 'Add 20 to 80 to make 100. Combine it with the 10 yen left and it makes 110 yen.' The teacher's approach attempts to make the most of the children's comments and actions. Inviting children's comments and actions and having the children be the ones to voice the crucial points is a good teaching script that is shared by many Japanese elementary school teachers.

Supporting Children Learning and Understanding

The teacher107 asks, 'Ok, so, who found a method that doesn't use a group of 100?' Kume111 comes to the front, arranges the cardboard 10 yen coins, and reports, 'First, 40 and 40 is 80, then the 30 makes 110' (Solution II). When the teacher112 asks Kume, '80 and 30. And you first divided this into 40. Why did you divide it into two lots of 40? Was there a reason for that?' Kume113 responds, 'Umm, no.' The teacher is puzzled by Kume111's comment of '40 and 40 is 80' and responds with 'You didn't have a reason but you just felt like trying to divide it into 40s. And, it's 110,' before moving on to the next child, leaving this idea unexamined.

In carrying out this lesson, it is doubtful whether the teacher considered to seek other ideas than the decimal system of working in lots of 10. When Kume responded 'Umm, no,' the teacher could have created space for considering Kume's 'reason', perhaps by waiting a little longer for an answer or asking the other children what they thought the thinking behind Kume's idea might have been. That may have prompted

the children to realize that creating two lots of 50, rather than two lots of 40, and combining them to make 100, would have been a more accurate way to do the calculation, an approach that everyone could have understood. Furthermore, given that the teacher was moving around the classroom while the students were working, she could have observed each child's ideas, anticipated the direction of the lesson, and chosen the child whose idea was furthest from the correct answer to present first.

The teacher summarized the learning as 2 methods for finding the solution: counting all of the 10 yen coins, or using $8 + 3$ is 11 to understand that there were 11 lots of 10 yen coins and therefore being able to calculate $80 + 30$. Since the teacher has only summarized those ideas that she deems desirable and ignored other solutions, it could be said that this does not constitute a summary of all of the learning in the lesson. Following this, the teacher instructs the children to write down their impressions of the lesson, and the lesson finishes just about on time. It appears that although the teacher had based the lesson plan on the children coming up with and presenting a variety of ideas for finding $80 + 30$, she had not sufficiently preempted how to make the most of each of the children's ideas if they fell outside the framework of using units of 10 and carrying this over to values over 100. This can also be seen in the teacher's comment at the post-lesson discussion meeting that, 'it was different to (my expectations) when I made the lesson plan, so I was at a bit of a loss as to how to respond to that.'

In a high quality lesson, a range of ideas are put forward, evaluated and compared, with the aim of achieving a high level of understanding and satisfying everyone. To this end, teachers must study the teaching materials well and preempt as many potential responses from the children as possible. However, it is not uncommon for children to come up with ideas that fall outside even the most careful predictions. *Neriage* necessitates resourcefulness and the ability to make the best use of children's ideas without disregarding any of them. This means aiming to welcome children's unexpected responses, and valuing their feelings by not excluding their ideas.

Discussion

This study aims to reveal the aspects of *neriage* that have stood the test of time and those that have changed over the years, and to elucidate the teaching script (the visible structure) as well as the ethos (the invisible mindset) that supports this. To this end, the authors now examine and analysis the three lesson case-based studies and drive to discuss 1) the history of Japanese lesson practice and its relationship with *neriage*, and 2) the development process of cultural script of teaching and lesson design underpinned by *neriage* in relation with relation with the global world pedagogical trends (see Table 8.1).

Table 8.1 Presence of certain elements in each lesson

	Case-based study1 1966	Case-based study2 1996	Case-based study3 2014
Mathematical literacy	◎	◎	◎
Attention to children's everyday experiences	◎	×	○
Understanding of children's thoughts and feelings	◎	○	×
Children speak freely (including mumblings)	○	◎	△
Creation of a shared problem (compelling question)	◎	○	△
Collaborative learning for problem-solving process is established	◎	○	△
Effective response to the circumstances at hand	◎	◎	×
Keeping to the lesson plan	×	△	◎

Note: ◎ Very heavily present, ○ Heavily present, △ Slightly present, × Not present

Redefining Neriage Locally Through a Historical Lens

Looking back on the history of lesson studies in Japan, the so-called 'modernization of education' reform agenda began to intensify around the 1960s, with the National Lesson Study Council (*Zenjuken*) established in 1963. *Zenjuken*'s activities were 'radical in that they brought together university researchers and school-based teachers to study teaching' (Tanaka, 2017, p.26), and one of the objects they zealously pursued was 'collaborative learning'. They sought better ways of teaching through scientific lesson analysis based on data from recorded lessons by focusing on this collaborative learning.

Between the 1960s and 1970s, there was notable progression in 'lesson study' and 'professional learning community' case-based studies on real lessons, spawning a large number of titles related to lesson study and lesson improvement, and the results of collaborative research between academics and teachers was utilized in actual lesson planning and practice (Case-based study1, Shigematsu, 1971).

By the second half of the 1980s, the 'entrance exam race' had intensified, individualistic outlooks on learning were becoming more commonplace, and ranking-centric and control-oriented education and had permeated schooling. The 1990s saw even greater decline in lessons that placed collaborative learning at the center of teaching process, and uniform simultaneous curriculum teaching became mainstream. This change was not unrelated to Japanese society's shift towards advanced industrialization and the global world movement. Japanese children were responding to this social change, and it became difficult for education relying on collaborative learning processes to be accepted and for such lessons to succeed. Thus, the creation of 'learning communities' that necessitated high levels of initiative and careful consideration by teachers were increasingly avoided, and teachers had no choice but to move towards teaching based on simple uniform simultaneous

curriculum lessons. However, even within this, there were thoughtful teachers who tried to deviate from the uniform simultaneous curriculum in their lessons (Case-based study2, Sarkar Arani, 1999).

Around 2010, a number of different teaching methods and organizational learning theories were proposed that valued collaborative and cooperative learning, deviating from the individualist study model skewed towards 'proficiency' and 'memorization'. These stressed the importance of education that could restore children's communication skills and respond to the information society, all of which would also benefit industry. Japanese education policy moved from so-called 'communication ability' (Monbukagakusho, 2008) which emphasized teaching for building children's communication skills, to 'active learning' (Monbukagakusho, 2014) and the New National Curriculum Guidelines advocated 'independent and dialogic deep learning' (Monbukagakusho, 2017). In the present day, lessons from elementary school to university are incorporating groupwork, presentations, and debates, and inquiry-based, project-based learning is widely promoted. However, while having children do groupwork is comparatively easy, there is a tendency to neglect raising collaborative learning to higher levels. Thus, promoting collaborative learning is becoming an issue once again. Attention is turning to the kind of craft pedagogy that engendered the processes of collaborative learning widely sought after between the 1960s and 1970s, and the thinking behind this, specifically the ethos that underpinned *neriage* (Case-based study3, Mizuno, 2019).

Redesigning Neriage Globally Through a Pedagogical Lens

If we analyze the structure of these lessons-assuming the aim is the collaborative construction of knowledge and cognition-alongside the aims of the teachers who implemented these lessons, we can see how craft pedagogy lesson designs that realize *neriage* share some common features (Saito, 1964). In addition, we can analyze the three case-based studies from the pedagogical perspective of *neriage*, and see that although they have in common the teaching script of drawing out children's different ideas and comparing them, each lesson also has its own strengths (see Table 8.3).

Looking at the cases in terms of individual learning and designs for learning, in case-based study1, the scenario given is that 'we picked up acorns and threw some away' – *how many acorns did we pick up?* –, and the children consider and discuss this in terms of their own actual activities. A number of children noted that rotten acorns are of no use to them in their games, so they would not pick them up in the first place, or if they did they would throw them away then and there, reflecting the way they considered the problem in terms of their own everyday experiences. This prompted the formation of a 'shared problem' among the class that was pursued until the whole class could be satisfied with the solution. In case-based study2, the task was to think of a way to find the area of the grass excluding the road – *how would you find the grassy area?* –. This was a little removed from the children's everyday

experiences, but the teacher asked the children to express the solution in words rather than an equation, prompting them to think for themselves and discuss with each other in stages. Through this method the teacher was able to cast the task of expressing the solution in words as a 'shared problem', and generate energy to solve it.

Learning in case-based study3 focused on addition, specifically the scenario that 'we went to the candy store – *how much did it all cost?* –. Mita bought chocolate (80 yen) and rock candy (30 yen).' The problem of 'how much was it all together' linked the task of addition to children's everyday experiences. This privileging of children's everyday experiences is certainly an excellent cultural script of teaching that is common practice in Japanese elementary schools. However, 80 + 30 was a calculation that the children in the class were able to perform quickly, and thus the learning objective of 'think about how to do the calculation using money and diagrams' did not constitute a compelling question.

With regards to 'whole class dialogue and learning', arguably conflicts and differences in ideas generate energy in the classroom (the 'turn' within the lesson such as Teacher10, Eto14 and Teacher35, Ishida36 and Kuno37 communications in the case-based study1 and Teacher108 and Takahata109 communications in the case-based study2). Free and lively problem solving discussion by the children is desirable, but the teacher should not leave the children completely to their own devices. Their role is to watch the flow of the discussion and assist the deepening of the discussion by giving appropriate directions and instructions, including summarizing key points, bringing the discussion back to the task at hand, and providing new perspectives.

To give a concrete example, in case-based study1, the teacher35 prompts the children to visualize the scenario by saying 'How did they pick up the acorns in this problem?' This comment helps children to notice how the method of picking up the acorns is related to the equation they produce and deepen their thinking. Compared with the lively chat of the children, the teacher makes few comments, intervening only when this is effective in deepening the children's thinking. In case-based study2, responding to the various solutions proposed by the children, the teacher108 says, 'Ok, so, Takahata, go ahead. What are you going to explain for us?' and has Takahata109 analyze the different characteristics of each method. Here we can see how the effective teaching script for whole class learning involves having the students rather than the teacher voice the most important points uncovered in the discussion. In comparison, in case-based study3, we can see how the teacher failed to respond appropriately to the children's ideas when they went beyond her expectations (i.e., Kume111: 'First, 40 and 40 is 80, then the 30 makes 110'; Teacher112: '80 and 30. And you first divided this into 40. Why did you divide it into two lots of 40? Was there a reason for that?'; Kume113: 'Umm, no.').

Table 8.3 also shows how *neriage* can go wrong if the teaching materials themselves do not contain an appropriate problem. Creative pursuit in the classroom requires not only an authentic attitude towards teaching, children and teaching materials, but also an attitude towards learning (by the children themselves) that values children's serious pursuit of knowledge and ability to speak their minds freely, and that considers thinking enjoyable.

While *neriage* is a process of communal thinking towards problem solving, it is also a process of children deepening each other's understanding through learning. Thus, *neriage* cannot be achieved overnight. It requires careful consideration and perseverance by teachers to create a class as learning community. Achieving *neriage* in today's age rests on teachers' ability to build learning communities out of mutual trust and inter-personal relationships that can survive mutual criticism and growth. It also depends on how much teachers can improve their ability to be perceptive, to progress lessons in a meaningful way, to lead and to facilitate (Mizuno, 2019).

Conclusion

This chapter has used three case studies to elucidate part of the measures taken towards realizing lessons which successfully foster collaborative learning processes through which everyone can understand (and be thoroughly satisfied or convinced) – represented by the term *neriage*. It has revealed some of the features of *neriage* that have (see Tables 8.1 and 8.2) and have not (see Table 8.3) changed over time. It has also exposed how Japanese teachers learn to concern and integrate about *neri* and *age* in praxis and learn integrated together through school-university research partnership such as lesson study/analysis.

If we trace the lens through which teaching has been understood (or view of pedagogical correctness) over time, it has evolved as such: (1) teacher-focused (*teacher is central*.), (2) teaching-focused (*teaching is central*.), (3) learner-focused (*learner is central*.), (4) learning-focused (*learning is central*.) (Sarkar Arani et al., 2020). However, if we consider the historical changes revealed in the three case studies, the focus of teaching practice in Japan seems also to have moved backwards, from (4) learning-focused, to (3) learner-focused, and then to (2) teaching-focused (see Tables 8.1 and 8.2).

In actual practice, the active learning-style of teaching, which at first glance would make it appear that efforts have shifted from teacher-centered approach to learner-centered lessons, stops at children's participation in learning, often resulting in teacher-led knowledge transfer. Perhaps the reason for this is the way in which lesson study has become a mere formality at schools, and the tendency for teachers to

Table 8.2 Lessons aims and structures

	Case-based Study1	Case-based study2	Case-based study3
Lesson aim	Each child confronts the problem.	Draw out and compare a range of ideas from the children.	Utilize the diverse ideas of children through pair work.
Lesson structures	Successful exchange and debate of opinions occurs. The children think together as a group. *Learning is central.*	Shared ownership of lack of understanding. A large amount of time is dedicated to thinking as a group. *Learner is central.*	Pair work is combined with whole group learning in order to stimulate children's learning. *Teaching is central.*

Table 8.3 Redesigning teaching through Neriage

(1) *Individual learning* (confront the teaching materials, process of building a compelling question) The children confront the teaching materials through physical activities and discussions. Children form their own ideas and suppositions.	**Introduction**
(2) *Designs for learning* (process of forming a 'shared problem' for the whole class) Through connecting with classmates and the teacher, children broaden and deepen their learning and modify their ideas. This creates the structure for learning as a whole class. Through discussion, thinking and rethinking, a 'shared problem' is designated for the whole class to pursue.	
(3) *Whole class learning* (process of pursuing the 'shared problem' as a whole class) The whole class targets the shared problem and pursues its solution. The shared problem is pursued while the learning of each of the children is amalgamated, connections are made between ideas and with existing knowledge.	**Turn development**
Children examine their own ideas as they listen to the different opinions of their classmates. Conflicts between ideas are highlighted. Unexpected ideas and opinions are submitted to the class, and the inquiry deepens. Through discussion, an answer is formed that all of the children can be satisfied with (convinced understanding) and there is shared ownership of this. Unresolved issues are identified.	
(4) *Summary learning* (process of summarizing the gains made throughout the whole lesson, and establishing knowledge) The rules and principles within the learning are owned by the whole class and by each individual.	**Conclusion**

Note: Created with reference to Saito (1964, pp. 241–244)

seek 'know-how' when designing their lessons. In the era of globalization, before thinking *how* they would teach children, teachers must ask themselves *why* they need to teach the content. It is important to return to the essence of education, in which teachers learn and grow alongside students and teaching practice is hand-crafted. Through this, teachers' attitudes towards lessons, towards children, and towards teaching materials can develop and improve (Howe, 2005).

Based on the three case studies, this chapter has not only focused on the deliberate changes that were planned for the improvement of the lessons in question and the effects of these. It has also illuminated the impact of unexpected happenings on lesson plans and effectiveness, particularly the decisions made by teachers on the spot based on their experiential and tacit knowledge, and the way in which these can sometimes have a large education significance.

Teachers with a wealth of experience sometimes give outstanding lessons or demonstrate best practice, and these masterful performances receive respect from colleagues. However, these are unique as craft pedagogy and are difficult to replicate or repeat. This is because teaching scripts are visible from the outside, but the ethos

behind these is not so visible. To put it another way, without uncovering this ethos, outstanding lesson practice cannot be recreated.

Accordingly, simply changing teacher's attitudes towards lessons or their knowledge about teaching tools and methods will not necessarily change the quality of teaching itself. Lesson design and actual lesson practice, for better or for worse, reflects the cultural script of teaching of the country, region or school in which the lessons are conducted. While a lesson in which mistakes are permitted and children feel safe to participate could be described as 'pedagogically correctness', if children's responses are not in turn responded to by their teacher or classmates, it might not be described as professionally correct, the so-called professional correctness (Sarkar Arani, 2017; Sarkar Arani et al., 2020).

Future research should work to develop research methods to reveal the essence and trend of the teaching ethos that acts as the cultural basis of this teaching practice and praxis. It should also investigate the cultural script of teaching and underlying ethos of *neriage* in subjects other than mathematics as well as nowadays quality of lesson study process in Japanese pedagogical context.

Appendices

Appendix 1: The Process of the Lesson, Case 1

T01: What is this question [look at the blackboard] asking us?
Fukuda02: Um, it's asking how many acorns they picked up.
T06: What were these 17 acorns thrown away from?
Kato07: They threw away the rotten ones from the acorns that the 4 people picked up (board work-*bansho*-: "from the acorns we all picked up").
Tajima09: Because they threw away the rotten ones, so they divided up the rest between the 4 people. (Yes. . .) (board work: "the remainder after throwing some away").
T10: That's right. Ok, do you think you can do this on your own? Please have a go.
Eto14: There were 9 acorns each when they divided them between 4 people, so 9 times 4 is 36. (I have an idea, I have a question, that's not right. . .) .
Kuno15: They got the remainder after throwing away 17 of them.
Ishida18: It's asking about the acorns they picked up, so don't the 17 they threw away get included too?
T19: What do we do with the 17? What do you think?
Soejima20: I don't think we include the acorns they threw away. (Why. . .?)

(continued)

Eto21: I agree.

T22: Let's see. It's asking about the acorns they picked up in the beginning, isn't it.

Kuno23: Why don't you need to include the acorns they threw away? Explain yourself.

Soejima24: If they were picking up the acorns in a basket, then they threw away the rotten ones, so we don't include them in the number of acorns they picked up, right? That's why. . . .

Tanaka25: But if you read the problem, it says "Of the acorns we picked up, 17 were rotten, so we threw them away." That means the number of acorns they picked up is before they threw away the 17.

Matsuda27: I think $9 \times 4 = 36$ is correct. Say I actually went out to pick up acorns. . . In that case I would throw away the rotten ones as I picked them up, so they wouldn't get included in the ones I actually picked up, so you ignore the 17 (3 other children with their hands up. . . Yes. Mhmm.).

T35: I see, Soejima is saying that he would have only picked up the acorns that he could use, and Matsuda and Sudo are saying that if while you're picking them up you think 'oh this one is rotten' and throw it away as you go along, then the answer is 36. How did they pick up the acorns in this problem?

Ishida36: In this problem, they didn't throw them away as they picked them up.

Kuno37: It says they picked up the rotten ones together. Because it says "Of the acorns we picked up, 17 were rotten, so we threw them away," so they looked at them later and realized they were rotten, then threw them away.

Soejima38: (Thinking hard).

Oda39: If you draw a picture of what the problem says, (board work, bottom) then if they pick them up in a basket, they all picked up the acorns and from there they threw away 17, right? Then they divided the remainder between 4 of them and they each had 9, right? So they put them in the basket whether they were rotten or not, so you include them in the number they picked up, right?

Soejima40: Ah yes, that's right after all.

Ono41: Even if it wasn't a basket, even if they picked them up in their hands, or in a bag, once they picked up an acorn, whether it was rotten or not, they picked it up, so of that number they threw away 17, so you add 17.

Inoue42: Because, it's asking "how many acorns did we pick up?"

Eto43: Mm. Yes.

Soejima44: It was. I. . . I was thinking of when I pick up acorns. But adding the 17 is correct. In this problem, you add the 17 after all. . . .

T45: You've changed your minds? Sudo and Matsuda, what about you?

Sudo's group agree that they have changed their minds. In red chalk, the teacher adds to the writing on the left of the board "36 + 17 = 53", clarifying that Eto's opinion has been revised.

T67: We might accidentally think that because they threw them away, we should subtract them, mightn't we? So we need to think very carefully about the problem. (Ads to board work in red: 36 + 17 = 53).

T68: If that's the case, the correct answer out of these is? (Oda's. I knew it. Me too. . .). (The teacher draws a circle around Oda's calculation on the board.).

T70: Thanks to the way we all thought about it together, we finally found out the correct answer. . . . Yes. Watabe, even you realized your own mistake during the lesson, didn't you? (Watabe nods) So, you've all done very well today (Children grin).

Note: The authors have numbered the lines in the lesson transcript. T denotes teacher. Children's names are pseudonyms. Children's whispers or mumblings and other additional information are given in parentheses (Shigematsu, 1971, pp. 47–54)

Appendix 2: The Process of the Lesson, Case 2

T15: We have a park that is a parallelogram (Fig. 8.1). Running through all this grass are straight roads. Now, the problem is asking what the area of the grassy bit is. The values aren't given. How would you find this [the grass] area? Please write your method out in words.

T16: If anyone has an idea, please raise your hand. (Cs raise hands) I see there are still some people who haven't got a clue. Those who don't know what to do, come over here for a moment. (Children gather by the blackboard)

C18: I don't know what we're doing right now. (The teacher explains the problem to the children who do not understand it), 'Since you said that you wanted to know how many meters or how many centimeters, then perhaps you already know how to solve the problem. I'll tell you the length later.'

Takahata35: First, it's a parallelogram, so I would ignore the road parts, and find the area of the parallelogram, then find the area of the road parts. I would find the answer for this road parts, and then subtract that from the area of the parallelogram (Solution I).

T44: Those who agree with Takahata, come to the front and put a sticker on the board. (Majority of children come to the front.). . .Ok, Oda, you go first.

Oda51: It might not be possible though. Since the area of the grassy bit is divided up, I would leave out the part covered by the roads and add up each of the four grassy sections (Solution II).

T54: Those who agree with Oda, come and put a sticker here.

Kobayashi55: Sir, can I add something? If you look at it closely (Fig. 8.1), this part and this part of the parallelogram seem the same. (T: Yeah?) Number 4 and number 1 are the same shape, and number 3 and number 2 are the same shape. Since they're the same shape, rather than add all four of them up one by one, for example if you find the area of 1 and 2, and then multiply by 2, I think you can do it more easily.

T64: Oh, right. This and this together. Really?... Got it. I should tell you the length (value), shouldn't I? . . .Go on Arakawa.

Arakawa65: Um, you take this length, so we have a parallelogram, and if you multiply this (bottom line) by this (height), you'll get the area straight away, but the width of this road is excess area so, you do the top length minus the road width, then the same for this one, and since this and this have the width of the roads taken away, you add up the 4 sections (Solution III).

T66: Did you get that?

Cf67: Yep, got it.

Cf68: I don't get it.

T69: This, is this what you mean? Take this length away, take this length away, and then do this? Ok, Sasamoto, is yours similar to this? It doesn't have to be similar.

Sasamoto83: First you take the road parts, then this and this and this and this (points to the 4 divided grassy parts), and you stick them together to make a parallelogram (Solution IV).

T84: Got it?

C85: Yep, got it. I had the same as that.

T86: Got it? Who doesn't get it?

C87:I don't understand.

T88: Those who don't understand, raise your hand. Those who don't get it, hands up. (Cs raise hands) ok, so, those who do get it, explain it to those who don't until they understand. (the children teach each other. A few minutes pass) Haruta, come here a minute. Explain the method that Sasamoto told us. Ok, listen up.

Haruta89: First, you take all of this road. Say you take out all of this road, right?

T90: Dig a hole in the earth?

Haruta91: No, say you take it out, right? Then, you join this and this and this and this together to make a shape. Like this.

T92: In other words, it makes a shape like this, right? These are separate, aren't they? These get split up, right?

Haruta93: You join all of them together.

C99: Isn't it the same as that one? Basically. (points to solution II)

C103: Yep, like, it's like this one and this one have been combined. (points to solution II and solution IV).

T108: Ok, so, Takahata, go ahead. What are you going to explain for us?

Takahata109: If we compare Sasamoto's method (solution IV) with Oda (solution II) and Arakawa's (solution III) solutions, Oda and Arakawa both find each of the areas and add them together, but Sasamoto (solution IV) finds the value of them all combined (bottom line and height) and then finds the area, so, that's why, Sasamoto's is more. . . .

T110: Quick. You mean this calculation is quicker? Is that what you wanted to say? Do you mean that this (solution IV) is very similar to these two (solution II, solution III), but it's different? Yes, I see.

Sugimura119: Then you add number 4 and number 3 together and they become a rectangle, join this and this and the horizontal times the vertical gives you the area.

C120: Oh, wow!

T121: . . . Ok, let me ask, Fujita, did you get it? What part have you understood? Have you understood everything? Which do you like the most?

Kondo128: I like number 3.

Taniguchi130: I figured out how to find the answer to number 1 and number 2.

T131: Ok, go ahead.

Taniguchi132: You need to find this, here, right? Um, this length, subtract this length, this, get this length, if you multiply this horizontal length then you find the answer.

T133: Arakawa, did you understand? How about everyone else? So he's saying that if you turn this over like this, and bring it here, this length, you subtract this from this length, and if you know that and this height then you can find the answer. Everyone satisfied? The truth is, today I had thought to get you all to do the calculation with the values in it, but let's leave it there for today, and, please write down once more what you thought of today.

C134: We write what we thought of? Like our impression? Which do we write?

T135: . . .Let's find the answer in the next lesson. I'll give you the values then (Fig. 8.2).

Note: The authors have numbered the lines in the lesson transcript. T denotes Teacher, C an unidentified child, Cs for multiple children, and Cf for 2 or 3 children (Sarkar Arani, 1999, pp.309–318). Children's names are pseudonyms. Children's whispers or mumblings and other additional information are given in parentheses

Appendix 3: The Process of the Lesson, Case 3

T04: Ok, so, today we are going to learn about the numbers up to 1000. Right, we are all going to a little shop. What kind of things will they be selling?

C12: 'We went to the candy store. Mita bought chocolate and rock candy.'

T30: Yep. Just now we said 'all together', but 'how much did it all cost?' means the same thing.

T31: Right, so, what kind of equation would this be? For all of it together. What do you think? Yes, Sato?

Sato32: Addition.

Kume36: Yes. 80 + 30. . . .

(continued)

T41: It seems you knew it was addition, and got the right equation. So, today we will work together to think how to do this calculation of 80 + 30.

T80: Ok, so, um, now you're all going to think about it on your own. Yeah? You can move the money around, count on your fingers, there are different ways you could do it, so find lots of ways to do the calculation. And, when you do that, let's not just do it in our heads. Let's say it in our little voices. Ok, start. . . .

T94: Ok, so, I think you all came up with lots of different methods, so what methods do we have? Ok then, Sato. Bring your notebook and come to the front. . . .

Sato96: (board work-*bansho*-: Draws a diagram) first, you draw a picture like this, and up to this line is 100 yen in total, and this left over 10 yen makes it 110 yen.

T101: I see.

Sato102: So, the answer is 110 yen.

T103: Ok, wait there a minute. Sato has made this 100yen. Then, she says there is 10 yen is left over (solution I). Thank you. Who found the same method? A block of 100 yen, make 100 yen and then combine it with 10 yen. . . . Kubota, you had the same, didn't you? Would you read from your notebook for us?

Kubota104: Add 20 to 80 to make 100. Combine it with the 10 yen left and it makes 110 yen.

T107: 20. For this bit you used 20. Use 20 to make 100. Ok, so, who found a method that doesn't use a group of 100? Ok, so, Kume.

Kume108: Yep. 40 and 40 are 80. . . .

T109: Come to the front for a minute. You can use the money or a diagram.

Kume110: (board work: Kume, uses 10 yen coins).First, 40 and 40 is 80, then the 30 makes110 (solution II).

T112: 80 and 30. And you first divided this into 40. Why did you divide it into two lots of 40? Was there a reason for that?

Kume113: Umm, no.

T114: You didn't have a reason but you just felt like trying to divide it into 40s. And, it's 110. Um, Nakano, you did a good job. Could you tell us about your method?

Nakano117: (board work: Nakano, uses 10 yen coins).First you start by getting 80 and 30. You move 2 lots of 10 from 80 to 30 (solution III). Then, you have 10 and 100, so 110.

T122: So, we also had Kokubo. Oh, yes, Kokubo was this one. Ok, I'd like Kokubo to present her method too.

Kokubo132: There are 11 lots of 10 so, it's 110 yen. So, the answer is 110 yen (solution IV).

T136: Ok, a few of you. So you've said 11 of them, but why 11? Someone had written an equation. Come to the front. Um, Tani, you wrote an equation. Tell us your equation that gets you 11.

Tani137: 8 + 3 is 11, and 0 + 0 is 0, and you combine the 11 and 0 that you've added, and it makes 110, so the answer is 110 (solution V).

T138: I see. It's similar but different, isn't it? Um, Mori, did you have the same idea? 8 + 3 is 11. You had the same?

T148: 110. So, that means we can calculate the answer of 110. Ok, Today we tried 2 methods. We learned about making a group of 100. But, counting the number of 10s also makes it really quick and easy. It makes it easy to do the calculation, doesn't it? So, we're going to use this method in the next thing we learn. Ok, so, add this to the end of your notes: Count the number of 10s and there were 11. Copy what I've written on the board. . . .

T153: Ok, so, if you've finished writing it, please write down your impressions of today's lesson.

Note: T denotes teacher and C an unidentified child. Children's names are pseudonyms. Children's whispers or mumblings and other additional information are given in parentheses

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Chapter 9
Teacher Education for Global Citizenship: What Can an International Practicum Offer?

Mellita Jones, Renata Cinelli, and Mary Gallagher

Abstract This chapter examines the influence of an international immersion program in Solomon Islands on Australian pre-service teachers' (PSTs) notions of global equity and justice. Mezirow's (Transformative dimensions of adult learning. Jossey-Bass, San Francisco, 1991) Transformative Learning Theory was utilised to investigate changes in PSTs' sense of equity and justice through reflections written immediately post-experience and a focus-group interview 12-months later. Thematic analysis enabling comparison between data sets indicated the program's transformative and lasting program influences on PSTs' social justice understandings, actions and intentions. Findings highlight the potential of such programs to develop attitudes, intentions and capabilities for a socially just form of global citizenship amongst PSTs.

Keywords Transformative learning · International immersion · Global citizenship · Global citizenship education · Teacher education · Pre-service teacher education · Social justice

> *If we are going to have a globe worth inhabiting, we must attend unflinchingly to the kinds of human beings that will inhabit it.*
>   Howard Gardner (2011, xi)

Introduction

This book chapter analyses the influence of an international immersion program in the Solomon Islands on Australian pre-service teachers' (PSTs) formation as global citizens concerned with equity and justice. This exploration is important in the

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current global context given the prevalence of equity and justice issues, which are linked to notions of global citizenship (Yemini et al., 2019). Increasingly, the world is functioning as a global society, where the economic, political, and environmental situation in one geographic location has consequences elsewhere (Apple, 2011; Friedman, 2015). Moreover, it is a society where the neoliberal ideology of the world's advanced economies (such as Australia's) reifies and promotes global injustice (Pashby et al., 2020), and to some extent, drives the educational policies of the western developed world (Gardinier, 2020). The subsequent disparities in opportunities and lifestyles within and between countries of the world makes education concerned with more socially just forms of global citizenship essential.

Global societies are influenced by globalisation, a phenomenon brought about by the 'effect of increased interdependence, interconnectedness, and cultural diversity' (Gibson et al., 2008, 11) stemming from widespread, instantaneous communications technology (internet, social media); mass migration; increased travel; an increasing global free-market economy; and escalating global challenges (terrorism, climate change). The resulting experience of diverse peoples, cultures, customs, and life-styles influences how learning about the world takes place, and how one situates oneself in and relates to such a world. There is a subsequent growing call for a globally focused form of education that challenges the lifestyles and attitudes of students from the developed western world to critically reflect on their contexts, engender understandings of world realities, and develop a desire to pursue justice, equity and human rights for all (Mansilla & Jackson, 2011). Such a focus links to a critical global citizenship (Oxley & Morris, 2013; Pashby et al., 2020). We align with others (e.g., Goodwin, 2010; Guo, 2014; Yemini et al., 2019) who believe that teacher education has a crucial role in achieving critical global citizenship.

An example of a teacher education program concerned with global equity and justice has been established at an Australian university that immerses PSTs in Solomon Islands, a developing country where the relative life outcomes are below that of other countries (United Nations, 2019). Whilst immersed in Solomon Islands life, PSTs complete a four-week teaching experience in local schools. Using Mezirow's (1991) transformative learning theory to explore the influence of this experience on PSTs' sense of global equity and justice, this paper outlines the notion of socially just global citizenship; the nature of the program; and the subsequent influence on one cohort of PSTs' attitudes and behaviours through the lens of critical global citizenship (Oxley & Morris, 2013). The study explores two questions:

- In what ways does cultural immersion (through a Solomon Islands practicum experience) influence Australian PSTs' social justice understandings, actions and intentions? and
- To what extent are any changes in social justice understandings, actions and intentions aligned with critical global citizenship?

Background

Socially Just Global Citizenship and Teacher Education

There are multiple definitions of globalization and what it means to be a global citizen (Gibson et al., 2008; Oxley & Morris, 2013; Pashby et al., 2020). Broadly defined, citizenship is concerned with the rights and responsibilities that accompany recognised membership of and concomitant protection by a particular country. From this, global citizenship can be understood to be concerned with membership of the broader world, and subsequent rights and responsibilities associated. Understandings of citizenship tend to be politicised, promoting the prevailing Western/European ideology of neoliberalism (Gardinier, 2020; Pashby et al., 2020) or are situated within a social justice framework. Oxley and Morris (2013) present this as a binary of typologies: universal cosmopolitan that represents a more neoliberal orientation, or relativist advocacy-based citizenship concerned with social justice. We align with the latter, as we are concerned with individuals' understanding of the impact that disparities in access to power, wealth, and knowledge have on opportunities (Mansilla & Jackson, 2011), and their subsequent drive to act on these understandings. This perspective is a *critical* form of global citizenship 'that acknowledge[s] and address[es] social injustices. . . [through approaches] that raise the status quo as problematic' (Pashby et al., 2020, 153).

Education is key in developing global citizens (Pashby et al., 2020). Consequently, it is important to consider how a more critical global citizenship is shaped through education to ensure greater global equity and justice is realised, and reification of more neoliberal outcomes are avoided. Equipping teachers to meet such expectations is problematic given inadequate preparation of educators to facilitate such understandings (Goodwin, 2010; Yemini et al., 2019). If teacher education is to interrupt the status quo, then its programs need to embed knowledge, pedagogy, intercultural competence[1], and notions of responsible global citizenship (Guo, 2014). It is also essential that prevailing neoliberal influences that undermine social justice by promoting global economic competition are challenged (Pashby et al., 2020). This requires an understanding of societal structures that perpetuate inequity (Oxley & Morris, 2013) alongside an appreciation of the diversity of peoples and cultures. Speaking to the latter of these, Cushner (2007) argues that direct experience with different cultures is needed, where PSTs can develop their intercultural competence, sensitivity, empathy, independence, professional autonomy, self-efficacy, flexibility, resilience, confidence, and other key teaching characteristics (Ateşkan, 2016; Cushner, 2007; Klein & Wikan, 2019).

Orientated towards Oxley and Morris' (2013) critical global citizenship outcomes, short-term intercultural experiences, particularly in less westernized parts of the world (Mathews, 2017), can be used to challenge ethnocentric views and

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[1]Broadly defined as appropriate and effective communication and behavior in intercultural situations (Deardorff, 2009).

expand understandings of cultural influences on teaching and learning (Davies, 2017; Kabilan, 2013; Klein & Wikan, 2019). They can increase students' awareness of self and others and assist in education for just global citizenship (Smith et al., 2017). Some also argue that an overarching academic program targeting relevant critical reflection is needed to avoid potential colonial outcomes and/or superficial 'tourist gazing' (Klein & Wikan, 2019; Samuel & Mariaye, 2014; Sharpe, 2015).

Yemini, Tibbits, and Goren (2019) indicate that teacher education remains under-examined in regard to global citizenship education. Further, most programs that do exist are concerned with professional skills regarding enhanced intercultural competence to better service the growing multi-cultural settings of schools (Yemini et al., 2019), which tend to perpetuate neoliberal ideology (Gardinier, 2020; Pashby et al., 2020; Schultz 2007). Even in higher education more broadly, internationalisation tends to be driven more by marketing and competition than by a social justice agenda (Klein & Wikan, 2019). These cosmopolitan approaches (Oxley & Morris, 2013) are 'antithetical' (Schultz 2007, 252) to social justice. This study addresses this gap by considering how a program designed for critical global citizenship through a transformative learning approach (Mezirow, 1991) influences the longer-term attitudes and behaviours of PSTs.

The Solomon Islands Context

The program was set in the Solomon Islands, a location significant for the considerable contrast it provides to the Australian context from which the study's participants come. Solomon Islands has a Human Development Index[2] ranking of 153, placing it amongst the world's poorest countries (United Nations, 2019). Comparatively, Australia ranks sixth, amongst the world's wealthiest nations. The location is also significant in its social, climatic, cultural, political, educational, and economic distinctions. For example, the majority (95.7%) of the 600,000 population identify as Melanesian (SINSO, 2015) compared to the ethnically diverse 25.6 million population of Australia (ABS, 2020). The Solomon Islands' climate is hot, humid, and tropical, and issues of infrastructure stemming from a combination of diasporic and economic challenges make it difficult to meet basic needs such as food, education, health facilities, and employment (PIFS, 2015). Access to power, internet, fresh and/or running water is unreliable or unattainable (Sharma et al., 2015); issues exacerbated by long-term ethnic conflict (Schwarz et al., 2011). Some of the Pacific region's highest rates of physical and sexual violence also report from the Solomon Islands (Ming et al., 2016; PIFS, 2015).

Education is a major concern in the Solomon Islands (MEHRD, 2016), with relatively low levels of school completion and teacher education (MEHRD, 2017). Classrooms tend to be crowded and ill-equipped (Sharma et al., 2015), with limited

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[2]HDI is a composite measure of a country's education, economic, and life expectancy outcomes.

technology available for teaching and learning. While English is the official language, it is third or later acquired behind 'mother tongue' (of which there are up to 80), and Pijin, the local lingua franca. These circumstances provide challenges associated with pedagogy, resources, and communication.

Alongside the challenges, the Solomon Islands offers a rich cultural experience. Social support occurs within communities through the traditional 'Wantok' ('one talk') system that identifies groups of people by proximity and common language. This system is representative of the high social and cultural capital associated with its collective society (Craig & Porter, 2014) and contrasts the individualistic, consumer-driven lifestyle (Toth & Szigeti, 2016) of Australia.

These experiences provide PSTs with an experience of deeply connected relationships with and between people, as well as exposure to distressing circumstances experienced by the children, teachers, and community members with whom they interact. This disrupts PSTs' assumptions about accessing what they generally consider basic human rights; access they come to realise they take for granted in Australia. This challenges them to consider different ways of thinking and managing their emotions as they mediate poverty, gender inequality, violence, and standards of living and education that fall well outside their experience. Among other program outcomes, such a contrast is intended to confront PSTs' worldview and challenge their notions of global equity and justice.

The Practicum Program

The program, which had been running since 2009, involved selected PST applicants from an Australian Bachelor of Education completing a four-week teaching experience whilst immersed in Solomon Islands' life. Immersion involved living in conditions commensurate with those of local teachers from the host school located on the outskirts of the capital city, Honiara. In 2016, the program expanded to a small, rural primary school located on a nearby Island. PSTs worked in the Primary division (Grades 1–6) at both locations.

Three years into their four-year qualification, PSTs had more formal teacher education than local teachers, who were mostly one-year (Certificate) trained. This training was also more content than pedagogically focused. These conditions are common in developing country contexts (United Nations, 2019) and subsequently, local teachers tended to view the program as a professional learning opportunity; an aspect being researched and reported separately.

The immersion experience was situated within an over-arching academic program. This helped to address reported limitations concerning international programs that lack concomitant academic support (Klein & Wikan, 2019; Santoro & Major, 2012). Academic support also allowed for a critical orientation to reflection aligned with Oxley and Morris' (2013) critical global citizenship.

Preparation involved three compulsory pre-departure sessions introducing specific and general cultural knowledge (e.g., Hall, 1976), notions of culture shock

(Gullahorn & Gullahorn, 1963), and inter-cultural communication (Ting-Toomey, 2009). Additional information was presented through the University's online learning system and supported through various social media groups, including one connecting current and previous program participants.

In country, PSTs planned and delivered lessons, with local teachers facilitating understanding of cultural practices, the curriculum, and the Solomon Islands' Pijin. Most PSTs had full classroom responsibility from day one and local teachers often left the classroom for all or part of the teaching day. We supported PSTs by facilitating small group lesson planning and weekly debrief sessions. Incidental support and focus group discussions covered PSTs' experiences and promoted learning through critical reflection. A compulsory debrief session was also held within three weeks of returning to Australia.

The various methods of support were mediated through our personal lenses of social justice and transformative learning (Mezirow, 1991). This positioning influenced the focus of reflection towards the richness of Solomon Islands' culture, ways in which it differed to Australia, and was aligned with critical global citizenship education. We achieved this by challenging PSTs' assumptions about the underpinning structures (e.g., capitalism) that contribute to the disparities between their experience of Solomon Islands and Australia. We were cognisant of recognising that PSTs were at different junctures in their individual learning journeys and therefore used multiple entry points to facilitate appropriate levels of reflection and challenge.

Methods

A qualitative research approach concerned with personal experiences involving data about 'what people do and say' (Habib et al., 2014, 9) was adopted, where researchers are inherently involved rather than being objective observers (Denzin & Lincoln, 2011). This fitted our emphasis on entering and looking for meaning within a particular contextual setting and aligns with Mezirow's (1991) Transformative Learning theory focus on how participants describe the shaping of their values and actions as a result of immersion in circumstances that they find confronting.

Two of the authors, academics with four- and nine-years' experience leading the program at the time of data collection, conducted the research. They had working knowledge of cultural mores and appropriate methods within Melanesian cultures as outlined by Redman-MacLaren et al. (2014). The third author, who joined the program in 2017, participated in data analysis and reporting, and a fourth colleague of African descent assisted in reviewing themes and writing to ameliorate colonialist interpretations and reporting.

Theoretical Framework

Mezirow's (1991, 2003) Transformative Learning (TL) theory informed the study. TL provides a framework for altering the 'frames of reference' through which adults understand the world (Mezirow, 1991) via exposure to disorienting dilemmas, creating cognitive dissonance that triggers reflective learning. Such a form of learning was intended to steer participants from Australia's privileged Western-world context 'towards a frame of reference that is more inclusive, discriminating, self-reflective and integrative of experience' (Mezirow, 2002, 5). In this way, TL is underpinned by the emancipatory ideologies of Freire and Habermas (Mezirow, 2003); ideologies that also drive critical global citizenship (Oxley & Morris, 2013; Pashby et al., 2020).

Taylor refers to Mezirow's disorienting dilemmas as 'triggers that provoke critical reflection . . . allowing learners to experience learning more directly and holistically, beyond a logical and rational approach' (Taylor, 2000, 7). As such, triggers for TL are both cognitive and emotional in nature, and the combined effect is what challenges the learner's existing frames of reference (Kroth & Cranton, 2014). These triggers then engender critical reflection on assumptions and understandings, and potentially the reauthoring of frames of reference to accommodate experiences within an expanded worldview. Such an outcome is more likely to elicit forms of action and activism (Carter et al., 2014); a further indicator of TL (Mezirow, 1991). TL aligns with critical global citizenship, and particularly with transformative global citizenship, which attempts 'to link action at the local and global level to build authentic challenges to those forces that perpetuate oppression, poverty, and marginalization' (Schultz, 2007, 256).

TL is commonly applied to studies undertaken in different cultural contexts (e.g., Dunn et al., 2014; Okken et al., 2019; Rubin, 2020) and in global citizenship education (Klein & Wikan, 2019). This is due to the ways in which intercultural experiences tend to offer the disorienting dilemmas that promote critical reflection on which TL relies (Mezirow, 1991, 2003). In this study, PSTs were confronted by the substantial differences between opportunities they are afforded in Australia compared to those available to Solomon Islanders. We facilitated critical reflection on these experiences to challenge PSTs' awareness and understanding of the associated inequity and injustice surrounding their relative life privilege. We looked for evidence of subsequent TL and critical global citizenship by exploring the influence of their experiences on their understandings, actions, and intentions, both immediately and 12 months after their immersion experience.

Data Collection

The 20 PSTs who attended the 2016 program (aged 21–24 years) were invited to participate in two phases of qualitative data collection. The first was an immediate

post-program (IPP) online questionnaire constructed with open-ended questions (Data Set 1). Ten PSTs responded to this questionnaire within one month of their return to Australia. The second involved a two-hour focus group interview (Data Set 2) which, in order to provide PSTs an opportunity to reflect on their immersion and time to enact resultant changes in their lives, was conducted approximately 12 months post-program (Delayed Post-Program) (DPP). The timing of the DPP focus group was two weeks after PSTs completed their final year practicum in Australia, enabling, to some extent, an opportunity for influences of the program to be enacted in their teaching practicum.[3] Eight PSTs participated in this interview.

Specific prompting for responses related to equity and justice were avoided. Rather, questions were targeted to generic professional and personal learning, what PSTs perceived had stayed with them, and influenced their lives. Findings from the two data sets were summarised (Table 9.1) and the comparison between them was used to identify PSTs' longer-term ideas about equity and justice analysed for subsequent evidence of TL and critical global citizenship. Findings help to address the gaps in research regarding both the lasting effects of international PST programs (Mathews, 2017), and those associated with a critical global citizenship orientation (Yemini et al., 2019).

Data Analysis

Braun and Clarke's (2006) six-phase analysis framework was adopted to analyse the data.

Data Familiarisation (Phase 1) involved identification of personal and professional learning topic codes from transcribed interviews. Within these topics, processes of constant comparison were used (Corbin & Strauss, 2008), allowing data with conceptual similarities to be grouped and coded (Phase 2). Researchers independently applied this initial coding process using a latent approach (Braun & Clarke, 2006), looking beyond explicit statements and interpreting them for underpinning ideas, assumptions, structures and/or meanings. Braun and Clarke (2006) contend that such an analysis aligns with sociocultural studies, which is consistent with the TL approach underpinning this research.

Researchers then met to discuss their independent initial coding and to discuss discrepancies, which tended to be associated with terminology (e.g., peer support and supporting one another). Researchers took the agreed codes and re-read transcripts independently, identifying codes that needed collapsing or expanding.

Aligning with Phases 3 and 4 of Braun and Clarke's (2006) framework, researchers met again, collated codes, and defined initial themes. Ongoing discussion and multiple data sweeps led to further refinement of definitions for each theme

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[3]PSTs would have very limited opportunities to enact changes during their practicum given the limited autonomy these experiences generally allow.

Table 9.1 Personal learning themes immediate (IPP) and 12-months (DPP) post-program

Theme subtheme	Sample comments
Increased awareness	
Expanded worldview	The experience has allowed me to witness first-hand a country that has a vastly different culture to my own and to learn to appreciate certain aspects of my life more. . . . I have become much more appreciative of the opportunities that have been afforded to me because many of the things I take for granted in my life may never be possible in the Solomon Islands. (IPP) When I was over in the Solomon Islands it really hit home – I found myself very naïve to what actually is going on in the world, like I live a very sheltered and privileged life but when I got over there I was like . . . they didn't have running water, they didn't have education, they didn't have books and we were just - sitting there being, like, wowser. . . (DPP)
Cultural competence	Working with children and teachers with a completely different culture and language has impacted greatly on my communication skills and has made me better at understanding and analysing body language (IPP)
Importance of education	It made me really acknowledge how great our education system really is... I was able to recognise and acknowledge how many people around the world do live, and it made me realise how lucky I really am, and how my life, especially education, should not be taken for granted. (IPP)
Teaching intention	
Teach elsewhere	I feel that it is incredibly important for me to continue to help others both within and outside of Australia, using my expertise in the field of teaching . . . to ensure I am making a positive difference on people's lives. (IPP)
Raise awareness	. . . that's the thing that I would like to change; instead of having those materialistic aspirations veer them off into things that are more worthwhile like education. . . (DPP)
Comparisons	
Education system	. . . they had lots of children that were held back and were much older than what you would say would be a typically normal grade level... So, I think the challenge was trying to cater my lessons so that everyone could be involved in the lesson (DPP)
Children's attitudes	I was just on placement [in Australia] and. . . everything was 'no I don't want to do that. . .' so that's what I loved about over there; the kids would do anything, they give everything a go, they were resilient. . .they never said 'no' because they love their learning. . . they knew what it meant to them. And kids here just don't have that same perspective. (DPP)
Challenges	
Reverse culture shock	. . . we did a lesson on Islam [on recent Australian practicum] . . . I said to the kids 'when I say the world Islam to you what do you think?' And they all said 'terrorist, bombings, burqas'. And you know? I don't blame them, . . . I would have said the exact same thing in grade 5 or 6 which is, you know, makes me feel really bad about myself . . . it's very much the media and the world that we live in today ... And these children . . . who have access to education and the top materials in the world have no idea just what's out there, and as a teacher, I don't want my students to – Have that. You need that experience to actually turn the corner but also, I don't want my students to get to the point where they're 21 and they're having that experience. (DPP)
Living conditions	Yeah, no power – Just there were so many obstacles that wasn't just teacher-related it was the day-to-day stuff that I think was on a personal level something I'd never experienced . . . (DPP)

(Phase 5). These were matched to data extracts and related to the research questions, ready for reporting (Phase 6). The analysis process yielded high inter-rater reliability, an aspect of qualitative data analysis important for credibility and trustworthiness (Mertens, 2005). The inductive approach also aligns with qualitative research in that it best allows for the voice of participants to emerge (Bernard & Ryan, 2010). The analysis process was applied to IPP and then DPP data, allowing for comparison of the initial and longer-term effects of the program. The small number of participants in this study does limit the transferability of findings. However, Bernard and Ryan (2010) indicate that as few as 10 knowledgeable participants is sufficient when seeking an understanding of a cultural context, which would apply to the study reported here.

Ethical Considerations

Given the closeness of the researchers to the program, consideration for any sense of coercion was important. To address this, participation was invitational and voluntary, with assurances of no negative consequences for non-participation. The research was discussed at a briefing and follow-up email utilised to invite participation; firstly, for the IPP questionnaire, then again 12 months later for the DPP interview. The IPP questionnaires were anonymous, so there was no way to ascertain whether the same PSTs participated in the two forms of data collection. The study received Human Research Ethics Committee clearance.

Results

A number of themes concerned with PSTs' professional and personal learning were identified in the data. It was under the topic code of Personal Learning that PSTs' ideas about equity, justice and their worldview emerged. Given the focus of this paper, findings reported here are concerned only with data relating to the research question regarding notions of global equity and justice. Themes related to this were: 1) Increased Awareness (including sub-themes of Expanded Worldview, Cultural Awareness/Competence, and Importance of Education); 2) Teaching Intention; and 3) Comparisons and Challenges. Table 9.1 provides a summary of themes, sub-themes, and sample comments that illustrate their nature. A paper dealing with the full set of themes will be reported elsewhere.

Increased Awareness

Increased awareness was the most prominent theme associated with PSTs' personal learning; represented by three quarters of the IPP comments. It was also the main

theme identified 12 months later. Sub-themes relating to the focus on equity and justice included *Expanded Worldview, Cultural Awareness/Competence*, and *Importance of Education*.

Expanded Worldview

The sub-theme *Expanded Worldview* was a lasting outcome for PSTs, identified through comments reflecting increased awareness of the difference between their own and what they witnessed of Solomon Islanders' lives. It was evidenced through a sustained change in knowledge, attitude, and sometimes actions, that appeared to be triggered by new awareness of inequity: 'many of the things I take for granted in my life may never be possible in the Solomon Islands' (IPP). Responses under this sub-theme also reflected a lasting shift in perspective of what PSTs valued in life: 'It made me see that I probably have too many things in my life that I don't need' (IPP). After experiencing the sense of community and relationships between people in Solomon Islands, one PST lamented her Australian lifestyle, remarking 'you don't need much but family to be happy' (IPP). DPP data indicated a lasting effect leading to changes in how PSTs enacted their lives. For example:

> since I came back there were a few people that I'm now no longer friends with because I did realise that we were on such different pages . . . and they were sort of more . . . materialistic people and I think it sort of opened my eyes to the fact that, yeah, you do need to appreciate the people in your lives . . . not the things. (DPP)

> I am a very different person now than I was before . . . to be in a community where they lived so simply and so happy . . . they were just the happiest people I've met in my life! And I took from that that I can be that way too, so coming back, . . . I try not to let things stress me out like I did before. I was having panic attacks and those have stopped; I'm really a different person now, a whole different person. (DPP)

These excerpts reflect PSTs' increased awareness of aspects of Australian life (material possessions, access to opportunities), and a realisation that these things are often taken for granted or have misplaced value assigned to them in Australian culture. Such awareness initiated a transformation in PSTs' attitudes regarding what they valued and subsequent behaviours they enacted (changing friendship groups, appreciating opportunities and family). The nature of such changes suggests the beginnings of an epistemological repositioning in which core neoliberal influences (consumerism, individualism) were questioned and rejected, and the beginnings of a more critical global citizenship, which Pashby et al. states is evidenced through 'change [in] one' s convictions in order to change one's behaviour and relationships' (2020, 158).

Cultural Awareness/Competence

Cultural Awareness/Competence was another sub-theme within *Increased Awareness*. Immediately following the experience, PSTs' comments reflected increased

awareness of culture describing how they could now 'witness', 'learn', 'recognise', and 'acknowledge' cultural differences. PSTs noted being able to 'witness first-hand a country that has a vastly different culture to my own and to learn to appreciate certain aspects of my life more' (IPP) and '[I am] able to recognise and acknowledge how many people around the world do live' (IPP). Twelve months later, PSTs' contributions reflected a sense of competence rather than just awareness. Deardorff (2009) defines cultural competence as appropriate and effective communication and behavior in intercultural situations. In discussing their recent Australian teaching practicum, PSTs' comments indicated an increased ability to teach better, and cater for students from different cultures and language backgrounds as a result of their Solomon Islands experience. For example,

> the placement school I was at was very multi-cultural, majority of kids weren't Caucasian, and. . . coming from where I was last year in the Solomon Islands . . ., it enabled me to teach a lot better to them, to suit their needs. (DPP).

The distinction in the use of terms led to slightly different codes in the two data sets, with IPP data referring to Cultural *Awareness* and DPP data, Cultural *Competence*. Other comments reflecting this competence related to communication and English as an Additional Language/Dialect (EAL/D). For instance:

> being able to bring that back to the schools that we have here as well as just even being able to communicate . . . with kids who have English as a third language has really helped me in the classroom here. (DPP)

This portrayal of increased capability in their teaching suggests a transformation in PSTs' professional learning. Mezirow (1991) highlights increased confidence as an indicator of TL. This also reflects a greater openness to culturally diverse teaching but, whilst not precluding Oxley and Morris' (2013) critical global citizenship, does not evidence this as an outcome because PSTs did not seek to challenge the status quo which critical global citizenship requires (Pashby et al., 2020).

Importance of Education

Exposure to education in Solomon Islands confronted PSTs and inspired a recognition in them for the *Importance of Education*. Their discussion around this was evident immediately following the experience. For example,

> I think this experience really allowed me to . . . acknowledge how great our education system really is, and made me want to fight for change in countries such as the Solomon Islands. (IPP).

Many PSTs re-iterated this sentiment one year later, demonstrating a lasting gratitude. The awareness of the disparities that can exist in education provision and their new insight into how education can be taken for granted, stimulated a desire to want to fight for change in places where they sensed a need. This is indicative of Oxley and Morris' critical global citizenship, with its focus on 'challenges arising from inequalities' (2013, 306) and on the action advocacy 'to improve

the lives of dispossessed/subaltern populations' (306). Expressions of intent to raise awareness in others also reflects a critical global citizenship (Oxley & Morris, 2013) and is indicative of TL (Mezirow, 1991).

Teaching Intention

Teaching Intention was a minor theme in IPP data, but the second most prevalent theme in DPP data with over one-quarter of responses. TL was implied through changed thinking expressed through intentions for future action.

In IPP responses, PSTs' indicated an intention to seek additional opportunities to teach in disadvantaged communities, particularly international ones. Interestingly, the DPP data showed PSTs concerned not with teaching elsewhere in order to 'make a difference', but rather, to make a difference by raising awareness in Australia. For example, one participant, discussing his recently completed Australian practicum stated,

> I'd very often pull out pictures from the Solomon Islands and I'd have discussions with them [Grade 1 students] about just being grateful for what we have here, the education we have here, the facilities we have here and I'd kind of show them a different perspective, a different side of the world . . . then from that I was like 'So what choices and decisions will you make now?' (DPP)

Other DPP comments suggested participants wanted to 'empower other people here' [in Australia], and that they could 'make changes in kids' lives here to want to be better human beings and help them change the world'. These statements of intent revealed PSTs' activist mindset about wanting to create change for a more just and equitable world and support other research indicating that immersion experiences can enhance participants' worldviews and global perspectives (e.g., Davies, 2017; Kabilan, 2013; Mathews, 2017). However, the focus on wanting to impact the local setting rather than engage further in global settings is something, to date, not evidenced in the literature. This reflects Friedman et al.'s (2015) call for 'Glocalization', a coupling of global concerns with local action to make meaningful change in the world, as well as a transformative critical global citizenship which addresses global agendas in localised actions (Pashby et al., 2020; Schultz 2007). Further longitudinal research is needed to explore whether TL is evident in translating these intentions into actions.

Comparisons and Challenges

PSTs made numerous comparisons between Solomon Islands and Australia and reported these primarily in the DPP interview. The sub-themes related to this paper's focus included *Reverse Culture Shock*, *Education System,* and *Children's Attitudes*.

The reverse culture shock experienced by participants appeared to derive from newly expanded perspectives and a shift in values. These changes saw PSTs redefining what they considered important in life. One participant explained her struggle to deal with what she saw, as 'inconsequential issues' arising in her part-time job:

> I struggled with going back to work because I'd had such an amazing experience and so fulfilling and rich and deep and learning and stuff and then - someone would be yelling at me because I put them in the wrong seat in the cinema. Like, I'm sorry, but in the scheme of things it's really not an issue... (DPP).

Other reflections from the 12-month follow up related to materialism and the different pace of life in Australia. For example:

> being detached from that western world and the fast pace and the competitiveness and the greed and the money, it was kind of more just like community and family and tradition . . . and I think it's changed me because . . . coming back and seeing it in practice or in real life in a way it's kind of made me way more stressed here because I hate seeing what goes on around the world. But at the same time, it's made me more proactive to make things better and it makes me want to do the right thing because I've seen how it should be... (DPP)

Statements akin to this characterise the impact of the immersion experience on PSTs and reflects a critical justice orientation to global citizenship (Davies, 2017; Oxley & Morris, 2013; Pashby et al., 2020). It also demonstrates the increased desire in PSTs to not just understand the inequity they witnessed, but as Mansilla and Jackson call for, to 'communicate their views with the purpose of improving inequitable conditions' (2011, xiii). This desire to 'act' in their Australian context again reflects an achievement of Friedman et al.'s (2015) glocalization, as well as evidencing Mezirow's TL through using 'the benefits of education to . . . contribute to the social good and democratic freedom' (1991, 8). This shows that the advocacy/ critical approach to global citizenship teacher education (Yemini et al., 2019) that we adopted promoted a similar approach in our PSTs' own teaching.

Another comparison noted by the PSTs concerned the attitudes and resilience of Solomon Islander children compared to Australian children. Participants reported feeling 'annoyed' by children on their recent Australian practicum because they 'don't value their education or learning' whereas the children in the Solomon Islands 'would do anything, give everything a go... because they love their learning and... they knew what it meant to them' (DPP). Comments suggested appreciation and respect for resilience. For example:

> The kids are really resilient, and they are so positive compared to here. ... They played soccer on gravel like rocks. One boy fell over, one girl got hit in the head with the ball so hard I thought her nose broke, got up kept running. My kids on placement [Foundation in Australia] ... they're little - but one cried because she had the wrong shoes on and wanted mum to come back to school and give her the right shoes. Just the idea of resilience... they can cope in the Solomon Islands is something I just thought - wow. So now when those little kids cry, I'm like: 'You'll be right, you'll be okay, you're not going to die'. (DPP)

Overall, PSTs' responses to challenges reflected outcomes that speak to the criticisms that many international programs attract around voluntourism and colonisation that reinforce dominant values and perceived superiority (Klein & Wikan,

2019). This manifests in attitudes of 'us and them' often engendering pity for not living in ways valued by westerners (Vazquez, 2015). Such an outcome of strengthening colonial attitudes and structures is among the most prevalent criticisms for study abroad programs (e.g., Klein & Wikan, 2019; Parr et al., 2017; Samuel & Mariaye, 2014; Sharpe, 2015). Shifting away from such an outcome, PSTs' came to recognise the substantive cultural capital and resilience witnessed in Solomon Islands. The impact of this did not reinforce 'we have so much to offer', but rather 'we have so much to learn'. This is also reflected in earlier sections of this paper regarding worldview and what PSTs came to value in life. Again, without diminishing the complexities that were also acknowledged as a result of the poverty witnessed, PSTs' comments show potential shifts in their sense of global citizenship to one of increased equity and justice as described by Davies (2017) by wanting to bring about change in Australia culture as much as alleviating poverty in Solomon Islands. This presents hope for a critical orientation to global citizenship education as advocated by Pashby et al. (2020) and others.

Discussion

This study is significant in two key ways: firstly, regarding the longevity of program outcomes which were either evident or enhanced 12-months post-experience; and secondly, in contributing new evidence regarding the potential for international immersion experiences to engender a critical global citizenship orientation in PSTs. This latter finding also speaks to concerns surrounding potential voluntourism and colonisation that can be evident in some international student programs. Whilst we discuss these contributions separately, we acknowledge that it is when they are achieved together, that TL becomes evident.

There is a paucity of research into the lasting effects of immersion programs as most studies do not look beyond the immediate influence of such experiences (Klein & Wikan, 2019; Mathews, 2017). This paper contributes to the literature with evidence of outcomes 12 months post-experience where we saw lasting impacts on PSTs' lives. Several PSTs made statements of intent, and some of actions already taken, to share their experiences, raise awareness, and empower Australian children to work towards a more equitable world. One PST explicitly questioned his students: 'so what choices and decisions will you make now?' This illustrates one way in which teachers might influence a more critical global citizenship focused education in their own classrooms, supporting Yemini, Tibbits, and Goren's assertion that 'teachers may be the most influential agents of global citizenship education' (2019, 78).

The social justice and global citizenship outcomes of the program were reflected in PSTs' responses in both IPP and DPP data. PSTs were concerned with the materialistic, consumer-driven nature of Australian society and were humbled by the happiness witnessed in Solomon Islands' communities given the challenges of relative economic poverty. These seemingly conflicting realities triggered a sort of

'self-shock' (Zaharna, 2009, 191) and resulted in increased valuing of their own families and community. They stem from the disorienting dilemmas or 'triggering events' (Kroth & Cranton, 2014) linked to initiating TL experiences.

The study supports a TL approach to education which Mezirow (1991, 2003) discusses as a process of transformation involving reflection on understandings and assumptions and acting in changed ways as a result. The findings showed participants actively engaged in reflection on their experiences, questioning their assumptions, and subsequent action in their personal and professional lives. These are all indicators that the experience resulted in TL for PSTs, and often in a manner related to critical global citizenship.

An orientation towards critical global citizenship was evidenced in the actions PSTs enacted. This stemmed from their questioning of the attitudes, values and actions they became acutely aware of and rejected in Australian culture after the immersion experience. Although this led to actions that worked against the structures contributing to such conditions (consumerism, individualism), it did not actually reveal that PSTs understood the driving ideologies underpinning societal structure, nor how these are actually related to the inequity and relative poverty they witnessed. These deeper elements of understanding are required for a more complete critical global citizenship as defined in the literature (Oxley & Morris, 2013; Pashby et al., 2020; Yemini et al., 2019). Such deeper understanding could be achieved through the academic if it were set up to be more mindful of the structures contributing to global inequity and injustice, allowing for deeper understanding and connections to be fostered.

PSTs were clearly set on the path of recognition, questioning, transformation and actions required of critical global citizenship. These actions serve to resist some of the root causes of inequity where PSTs did enact personal and professional actions reflecting 'a desire to pursue justice, equity, and human rights' (Manislla & Jackson, 2011, 8). This was demonstrated in the way the PSTs embraced relatively limited opportunities in their one teaching practicum since returning from the Solomon Islands to influence the ideas and attitudes of the children they were teaching. These action and advocacy actions align with Pashby et al.'s identification of critical orientation to global citizenship as perceiving 'the status quo as problematic' (2020, 153). Refinement of the overarching academic program might further such outcomes.

Conclusion

This study sought to explore the ways in which a cultural immersion program (through a Solomon Islands practicum experience) influenced Australian PSTs' social justice understandings, actions and intentions and the extent to which any changes in these understandings, actions and intentions aligned with critical global citizenship. Findings support other research that indicates immersion experiences can benefit PSTs' personal and professional development in terms of expanded

worldviews and global perspectives (e.g., Davies, 2017; Goodwin, 2010; Kabilan, 2013; Mathews, 2017). Findings also address gaps in the research, evidencing lasting effects of outcomes and the beginnings of incorporating a social justice approach aligned with critical global citizenship in their personal and professional lives. Findings are also relevant in building the scholarship of global citizenship teacher education which has to date been more focused 'on the practical aspects of GCE [global citizenship education] rather than on the ideals it encompasses' (Yemini et al., 2019, 87).

The disconnect between what participants valued in life before and after their immersion experience exposes the naivety of the study's participants and reflects poorly on Australian culture. Indeed, it is concerning, although perhaps not surprising, that prior to the Solomon Islands experience, these young adults had such a-critical outlooks on family, friendship and lifestyle. It speaks to the social reproduction of education recognised by scholars like Bourdieu, Freire and Habermas which reinforces the consumerism and individualism of neoliberalism in Western societies like Australia. The Western world's prevailing capitalist nature that drives consumerism and over-consumption is inherently linked to global inequity and poverty (Kenner, 2015). Any shift in perspective away from such a programmed approach to living is an important step towards overcoming inequity and promotes a more critical form of global citizenship (Oxley & Morris, 2013). The actions PSTs took on their return to Australia reflected such a transformation in their lives; an indicator of Mezirow's (1991) TL and of more socially just citizenship.

Encouraging empathy and action is essential to addressing global inequity, and education is a key determinant for social change. We join others who purport that work addressing inequity in ways that respect the dignity of all peoples should be of primary concern in higher education (e.g., Oomen, 2015), and particularly in teacher education (e.g., Guo, 2014; Yemini et al., 2019). The findings from this study have implications for policy, practice and research, whereby international immersion experiences should be encouraged and supported across teacher education programs and in subsequent research funding. These initiatives must be sustained and expanded to ensure programs are widely accessible, and carefully constructed and implemented to avoid risks of voluntourism and colonisation. An advocacy and critical TL approach to the design of such programs may assist in achieving this.

More time and research are needed to examine lasting influences of these relatively new understandings and attitudes on PSTs' personal and professional thinking and actions beyond 12 months. This would enable an examination of program influences on participants as they enter the profession and gain autonomy in their own classrooms, and whether there is any impact on the children they go on to teach. Further research is also needed to examine if and how a stronger critical global citizenship might be fostered through the overarching academic program associated with the in-country experience. Our next stages of research will explore these ideas with past and future program participants. Only certain approaches to education have the potential to create a world 'worth inhabiting' as referred to in the opening quote of this paper. Our study shows the potential for international immersion programs in teacher education to be the conduit for explicitly focusing on such

types of learning, and thus attending 'unflinchingly to the kinds of human beings that will inhabit it' (Gardner, 2011, xi).

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Chapter 10
Education for Sustainable Development and Environmental Ethics

Issac Paul

Abstract Sustainability can be described as our responsibility to proceed in a way that will sustain life, which will allow our children, grand-children and great grand-children to live comfortably in a friendly, clean and healthy world. On the basis of the UNESCO (Sustainable development. Retrieved from https://en.unesco.org/themes/education-sustainable-development/what-is-esd/sd, 2020a) and UNESCO (Sustainable development goals for natural sciences. UNESCO, Paris, 2020b) *Sustainable development* and *Sustainable Development Goals for Natural Sciences* reports we can understand the need for good quality education for achieving a more sustainable world. Education for sustainable development (ESD) promotes the development of the knowledge, skills, understanding, values and actions required for creating a sustainable world, which ensures environmental protection and conservation, promotes social equity and encourages economic sustainability. In the conditions of a universal catastrophe, education is a roadmap that represents the most effectual way of consolidating social, cultural and intellectual basis for the achievement of sustainable development principles and co-evolution ideas. Due to escalating problems related to sustainable development the need of education for sustainable development continues to grow. This chapter examines briefly the current state of education for sustainable development (ESD), as a powerful means of forming of new consciousness and behavior, through which human development can shape the environment and thereby ensure sustainable living practices and thereby generate an environmentally ethical society too.

Keywords Education for sustainable development · Ecological education · Environmental ethics · Sustainable development · Globalization · Human-environment interactions · Social justice · Sustainability · Sustainable development · Values education

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159

Education for Sustainable Development and Environmental Ethics: Introduction

Education is an influential force to embed a will and facility for learning that enables one to develop the mind and intellectual capacity (Bunnin & Tsui-James, 2003). The key objective of a balanced society focuses varied life related issues and solves accordingly to achieve sustainable living and sustainable development. Sustainability may be described as our responsibility to proceed in a way that will sustain life, which will allow our children, grand-children and great grand-children to live comfortably in a friendly, clean and healthy world (Merchant, 1990; Jamieson, 2003; Kaushik & Kaushik, 2008; Keller, 2010). According to UNESCO's Sustainable Development Goals for Natural Sciences, the new 2030 Agenda for Sustainable Development represents a significant step forward in the global agenda for sustainable development:

> UNESCO contributes to the overall implementation of Sustainable Development Goals by providing policy assistance to support developing countries in strengthening their scientific and technological capacity, and to help Member States design effective policies, based on the best available knowledge, including local and indigenous knowledge systems. (UNESCO, 2020a)
>
> UNESCO is monitoring global progress towards specific Sustainable Development Goals through the UNESCO Science Report (SDG9), Global Ocean Science Report (SDG14) and the United Nations World Water Development Report (SDG6) (UNESCO, 2020b https://en.unesco.org/sustainabledevelopmentgoalsfornaturalsciences)

On the basis of UNESCO's Sustainable Development Goals for Natural Sciences report we can understand and accept the need for good quality education for achieving sustainable development goals and a more sustainable world. Education for sustainable development (ESD) promotes the development of the knowledge, skills, values and actions required for creating a sustainable world, which ensures environmental protection and conservation, promotes social equity and encourages economic sustainability (Attfield, 2014). In the case of a universal catastrophe, education is a roadmap that represents the most effective way of shaping the social, cultural and intellectual basis for the accomplishment of sustainable development principles and co - evolution ideas. Due to escalating problems related to sustainable development the need of education for sustainable development continues to grow. The humane aspects of sustainability with respect to environment, economic and social development is directly associated with development, aspiration, innovation and constructivist ideas of human building advancement, principally generated through a powerful educational system. Sustainable development and its initiatives in every nation depend on the creation of human resources with good morale, unique professional expertise, social commitment, diversity and highly creative competence all of which are needed to tackle the multifaceted problems and constraints and may help to solve the local, national and global crises too. These qualities and morals can enhance education and advancement for everyone through the systematic

Fig. 10.1 UNESCO's model of interlocking dimensions of sustainability
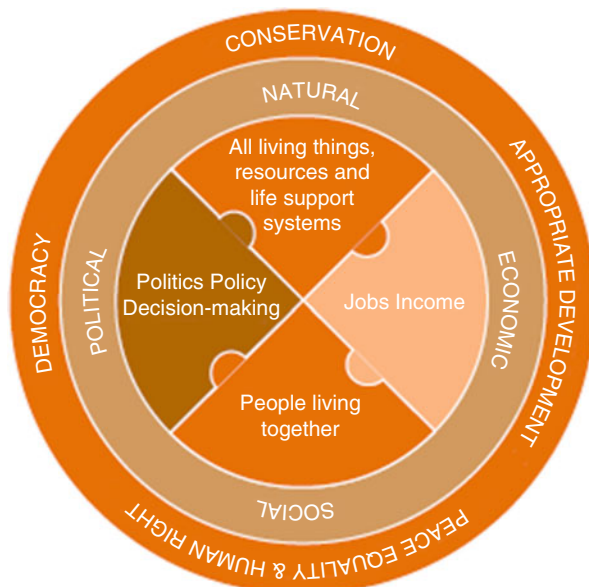
instructional practices of sustainable development (Bowen, 1994; Have, 2006; Woolorton & Marinova, 2006; Smith, 2007; Zajda, 2021).

The UN Decade of Education for Sustainable Development advocated the methodological reframing of ecological education with due emphasis on environmental ethics in the transactional platforms of education for sustainable development. Society needs competent teachers with modern comprehensive cultural thinking, formed ecological values and a high level of ecological culture. Understanding of the contemporary worldview regarding conditions of geopolitical changes and economic crisis is a key pedagogical problem of modern education that demands updating based on the principles of ecological and moral imperatives (Nasibulina, 2015) (Fig. 10.1).

Why Education for Sustainable Development?

Sustainable Development

Sustainable Development is 'that which meets the needs of the present without compromising the ability of future generations to meet their needs' (Brundtland, 1987). The Brundtland Report stated that 'critical global environmental problems were primarily the result of the enormous poverty of the South and the non-sustainable patterns of consumption and production in the North. It called for a strategy that united development and the environment' (Brundtland, 1987).

Sustainability Education can be summarized as follows:

- Aims to change the way we think, live and work for the development of a just society and healthy environment
- Values driven
- More than environmental education
- Encompass the broader context of socio-cultural, economic, political and ecological issues
- Integrated and holistic
- Whole school approach
- Promotes global citizenship and social justice.

Education for sustainable development (ESD) promotes the advancement of the varied strands of sustainable development in terms of knowledge, skills, understanding, values and actions required for creating a sustainable world, which ensures environmental protection and conservation, promotes social equity and encourages economic sustainability and environmental ethics. The aim of ESD is to equip people with the tools to solve environmental hazards, make feasible decisions and implement workable actions to strengthen our quality of life without compromising the forces of any external realm. It also aims to integrate values, ethics and cultural inheritance in sustainable development inputs into all aspects and levels of learning to achieve quality outcomes.

There are a number of key themes in ESD and while the dominant focus is on environmental concerns, it also addresses themes such as poverty alleviation, citizenship, peace, ethics, responsibility in local and global contexts, democracy and governance, justice, human rights, gender equality, corporate responsibility, natural resource management and biological diversity. It is generally accepted that certain characteristics are important for the successful implementation of ESD, reflecting the equal importance of the learning process and the outcomes of the education process. (Adapted from UN Decade of Sustainable Development UNESCO Nairobi Cluster, 2006). In order to attain the key aims and objectives of Education for sustainable development (ESD), it is necessary to plan, design, implement and practice various strategies, mode of operations, transactional platforms and assessment mechanisms for the coming young generation using co-operative, collaborative and participatory modalities. .

A well designed structure for the implementation of this kind of instructional practice will surely shape and empower our coming generations to make prompt and apt decisions in their communities and educational environment. The state of the environment is a reminder of what we as humans are capable of inflicting on nature, which by itself is in perfect harmony with its elements. However, it also highlights the opportunities at hand to reverse the process of environmental decline and work for the present and future built on the principles of environmental justice, equity and human development. In this regard the role of specific education with regard to sustainable development is critical as it is the cornerstone of a modern society. It not only determines the present level of progress of people of a society but also charts out the future course of advancement of civilization (Abraham, 2020. It can be diagrammatically represented below Fig. 10.2.

Fig. 10.2 Aspects of ESD

Environmental Ethics

Environmental ethics is the philosophical discipline and domain that establishes the moral and ethical relationship of human beings to the environment. While ethical issues concerning the environment have been debated for centuries, environmental ethics did not emerge as a philosophical discipline until the 1970s. Its surfacing was the upshot of enhanced level awareness and skills with respect of how the rapidly growing world population was impacting the environment as well as the environmental consequences that came with the growing use of pesticides, technology, industry and modernization.

Environmental ethics as a powerful mode for attributing human moral and ethical obligations and commitment towards the environment. But human values turn out to be a key attribute that determine the intensity of environmental ethics. Human values are the outcome of a sustainable living practice that is imperative to individuals to assess actions or events. In practice humans disperse value to certain things/objects/persons and effectively use this added value element to make decisions and actions about whether something is right or wrong. Human values tend to be particular to

individuals because people do not all all place the same importance on each element of life. Environmental ethics combined with human values result in philosophical ideologies about man's interaction and communication with the environment. Challenges of environmental sustainability viz.; pollution, depletion of natural resources, loss of biodiversity, and destruction of ecosystems, disasters, global warming and climate change are all part of the environmental ethics, and within the discipline of environmental ethics there are tough ethical decisions humans must consider.

Education for Sustainable Development and Environmental Ethics

The role of environmental ethics in ESD Education should be based on the systemic approach to the interaction of man, society and nature. The system of education for sustainable development has to fulfil new functions for transferring knowledge of those who foresee and forecast elements of sustainable development. For implementing the concept of sustainable development, society should always be responsible to nature.

Environmental ethics involves teaching about moral relationships of man and nature based on the perception of nature as a moral and equal partner, aimed at solving environmental problems. First and foremost, it is the construction of a system of values and normative attitudes of the society defining harmonious relations between man and nature. "The movement of the humanity towards sustainable development will finally lead to the state of mind predicted by V.I. Vernadsky, when spiritual values and knowledge of the Humanity living in harmony with the environment will become measures of national and individual richness" (UN, Concept of Sustainable Development for the Russian Federation, 2020). Hence, sustainable development must be realized and understood as a moral and historical objective with the necessity to transfer from the current material (industrial) civilization to a spiritual (ecological) civilization (Fig. 10.3).

The World Commission on the Ethics of Science and Technology (UN, 2009) stated that, "The main aim of the teaching of Environmental Ethics is to develop the students' ability to identify and analyze ethical issues in policies and actions related to the environment, nature, and nonhuman forms of life in order to be able to make ethically correct decisions and to act ethically. As a result of studying Environmental Ethics students should: increase their awareness of environmental-ethical issues; be able to provide ethical justification for decisions regarding the environment, nature, and nonhuman forms of life; and be able to apply ethical principles to policies and actions related to the environment, nature, and nonhuman forms of life."

Environmental justice education encourages students to think critically about the environment in the light of human political and social behavior. Pollution and environmental threats, as well as their effects on society, were at the forefront of the environmental justice movement. Educators have a rare opportunity to instill in
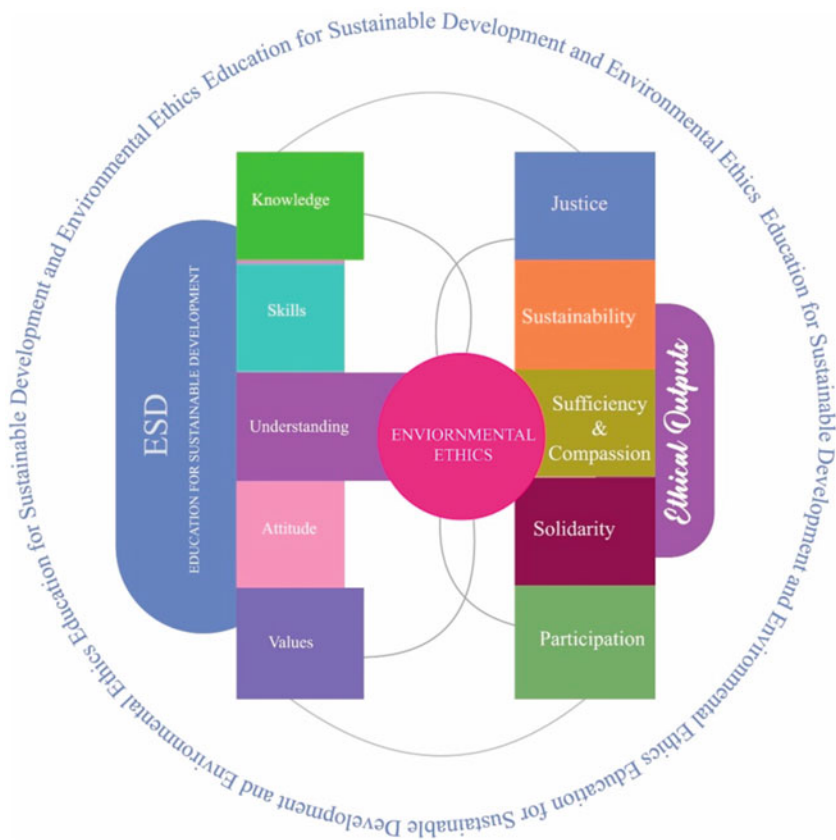
Fig. 10.3   ESD for promoting environmental ethics

their students a sense of environmental justice. The seeds of strong communities of resistance and planning can be sown by inspiring youth who live in places of injustice. Learning needs to promote an ongoing commitment to environmental stewardship, by encouraging a sense of personal responsibility for the environment, and promoting a commitment to sustainable living, as well as encouraging a sense of personal responsibility for the environment. This process of environmental sustainability education transforms concepts from classroom conversations into actionable actions to address neighborhood environmental issues.

Environmental education focuses on aspects relevant to current economic realities by emphasizing concerns for planetary solidarity. Environmental education is the process of identifying principles and clarifying concepts in order to acquire the skills and attitudes required to comprehend and appreciate the interrelationships between individuals, their society, and their biophysical surroundings. As a result, for environmental protection, stakeholder engagement is a critical outcome of education.

Strategies and Practices on ESD for Promoting Environmental Ethics

(a) **Using Appropriate Technology:** Such technology is one which is locally adaptable, eco-friendly, resource efficient and culturally suitable. It mostly involves local resources and local labour. Indigenous technologies are more useful, cost-effective and sustainable. The technology should use fewer resources and should produce minimum waste.

(b) **Reduce, Reuse and Recycle Approach:** This 3 – R approach emphasizing the minimization of resource use, using them again and again instead of passing it on to the waste stream and recycling the materials goes a long way in achieving the goals of sustainability. It reduces pressure on our resources as well as reduces waste generation and pollution.

(c) **Promoting Environmental Education and Awareness:** Environmental education will greatly help in changing the thinking pattern and attitude of people towards our earth and the environment. Introducing subject right from the school stage will develop a positive and caring feeling toward earth in small children. 'Earth thinking' will gradually get incorporated in our mind and actions which will greatly help in transforming our life styles to sustainable ones.

(d) **Improving Social, Cultural and Economic Dimensions:** Development should not focus just on one-section of already affluent people. Rather it should include sharing benefits between the rich and the poor. The tribal, ethnic people and their cultural heritage should also be conserved. Strong community participation should be there in policy and practice. Population growth should be stabilized.

(e) **Resource Utilization as per Carrying Capacity:** Any system can sustain a limited number of organisms on a long-term basis which is known as its carrying capacity. But human beings not only need food to live, but also need so many other things to maintain the quality of life. Sustainability of a system depends largely upon the carrying capacity of the system. If the carrying capacity of a system is damaged by over exploitation of a resource, environmental degradation starts and continues till it reaches a point of no return. The carrying capacity has two basic components: (i). Supporting capacity *i.e.* the capacity to regenerate and (ii). Assimilative capacity ie*;* the capacity to tolerate different stresses. In order to attain sustainability it is very important to utilize the resources based upon the above two properties of the system. Consumption should not exceed regeneration and changes should not be allowed to occur beyond the tolerance capacity of the system.

F-O-S-I-I-E Instructional Model for Generating Attributes of Education for Sustainable Development and Environmental Ethics

To generate the attributes, values, issues, perspectives and attitudes associated with Education for Sustainable Development and Environmental Ethics, an instructional model is proposed for effective pedagogical practices expected to be suitable for

secondary /senior secondary or graduate students. This suggested model called the F-O-S-I-I-E (Frame Learning Outcomes, Organize the Learning Environment, Select Media, Methods and Materials, IImplement Media, Methods and Materials, Interactive Learner Experience & Exercises and Evaluate the Model) instructional design model has the objective of inculcating and generating varied dimensions and aspects of Sustainable Development and Environmental Ethics through an interactive and technology mediated learning environment. This model is made in such a way that maximum provision is given for student's involvement and participation in the process of learning the content.

It is expected that this model willbe based on real world experiences and daily life situations and issues to be faced by common people in their everyday life. . This model has ample opportunity for the instructional practitioners to add updated content, situational tasks, film clippings, interview videos, multimedia E- content, computer assisted quiz sessions, expert talks, PPT with animation etc.

Structure of FOSIIE Instructional Design Model

INSTRUCTIONAL EFFECT (Direct effect/outcome to be generated from the model after its implementation)	Integrating and upholding the varied dimensions and strands of Education for Sustainable Development and Environmental Ethics generated in an interactive and technology upgraded learning space.
NURTURANT EFFECT (It is the byproduct that is to be attained by learner in addition to core learning outcomes)	Develop knowledge, skills, values, attitude, issues and perspectives on ESD and use of technology by integrating with content domains. Generate the spirit of justice, sustainability, sufficiency & compassion, solidarity and participation through the experience of critical thinking, creative problem solving and decision making.
SYNTAX (It describes the phases involved in the model. This phase describes the ways in which how to start, how to proceed and how to conclude the working of the model).	F – Frame Learning Outcomes O – Organize the Learning Environment S – Select Media, Methods and Materials I – Implement Media, Methods and Materials I – Interactive Learner Experience & Exercises E – Evaluate the Model
PRINCIPLES OF REACTION (This phase describes the dynamic nature of teaching and learning. i.e; it explains the nature of the reactions and process expected to be developed by learners)	In the initial stage of the FOSIIE instructional design model the teacher initiates the students by motivating them through some creative innovative and specific activity/ video/ brain storming to link their prior experiences with the new learning context. In subsequence phases students have a more interactive role through media, material, techniques, content and context by enabling them

	to uphold the various strands of ESD and Environmental ethics. During the final phase both students and teachers together engage in the process to evaluate the feasibility, quality and authenticity of the FOSIIE instructional model both quantitatively and qualitatively.
	During the implementation of the model the instructional practitioner of the model needs to be supportive, and encourage, and motivate each student to attain the objectives.
SUPPORT SYSTEM (This denotes the various kinds of instructional resources or support mechanisms to be used for the model)	Real world context, life experiences, games, videos, animations, PPT, activity etc., constitute the support system.

Syntax Description

> **Phase-1**
>
> **F- Frame Learning Outcomes**

- To equip the learner to be aware about the significant aspects of Education for Sustainable development with respect to the domains of knowledge, skills, values, attitude, issues and perspectives.
- To develop desirable attitudes and interest in environmental ethics with regards to justice, sustainability, sufficiency & compassion, solidarity and participation.
- To capacitate the pedagogical practices of Education for Sustainable development and its outcome generating exercises and experiences.
- To imbibe the transactional modes and strategic implementation for assimilating the spirit of environmental ethics.
- To be competent to evaluate Education for Sustainable development and environmental ethics and its practices and processes.

> **Phase-2**
>
> **O – Organize Learning Environment**

This phase involves

- **Foundation setting** – find the pre-entry level of learners on key essential attributes of Education for Sustainable Development and Environmental Ethics among the target audience
- **Bridging –** establish clear and visible pathways to connect prior knowledge with new learning context.
- **Creation of New Learning Space –** arrange the learning environment with due importance for interactive, creative and divergent idea creation and a process-oriented learning space.
- **Orientation –** try to provide and familiarize the target audience with the features and uniqueness of the new learning space.
- **Goal Clarification –** direct clear transactional pathways and instructions for the new learning experience and procedures.

> **Phase-3**
>
> **S - Select Media, Materials and Methods**

It involves

- Find the availability, economical, usability and appropriateness of suitable media namely off-line, on-line and blended modes.
- Ensure each medium is effective for transacting the content, process and will generate quality outcomes.
- Assure the select media are reachable to all the target audience with interactive and immediate feedback mechanisms.
- Prepare the materials which will enable an increase in higher order thinking, generate creativity, innovative and unique outlooks and provide an opportunity to enhance meta cognitive skills.
- Materials to be easy handy, economical and user friendly and focused to assimilate core components of Education for Sustainable Development and Environmental Ethics.
- Project based, inquiry based, problem based methodological approaches to be followed to ensure individual responsibility, collaborative skills, research driven attitude, skill of problem solving and by developing critical and creative thinking.

> **Phase - 4**
>
> **I – Implement Media, Methods and Materials**

A. **Preview the Material**

The teacher will preview materials to ensure that everything to be developed for the transaction and assimilation of the components and attributes of education for sustainable development and environmental ethics viz. activities, situational tasks, case analysis, small projects, videos, e-content, digital resources power point, quiz app etc., are functioning properly and are clear especially ICT based materials. Teacher will also examine all media and materials before class for effective presentation and implementation.

B. **Organize the Materials**

The teacher will arrange and setup the learning materials especially technologically supported aids and devices like computer, projector, pen drive or C.D, etc., in a very systematic and orderly manner before the class starts. All electrical equipment will be turned on and tested properly too in advance.

C. **Prepare the Environment**

The seating will be arranged properly to assure a conducive learning environment where it will be easy to move, interact with each other and cooperate to work collaboratively to complete the task appropriately. Teacher will start the session by checking the entry behavior and basic knowledge about the concept 'Education for Sustainable Development' and 'Environmental Ethics'. This session can build rapport by using brain storming and teacher directed instruction to motivate the learners to create a positive attitude towards this new topic but it should not extend more than 15 min.

D. **Prepare the Learners**

The teacher will inform the students about appropriate guidelines, instructions, objectives, expected outcomes, learning tasks, activities planned an so on before the class. The students will also be informed of the evaluation exercises that they will be given at the end of the class. By doing this the students will be comfortable when the class begins.

> **Phase - 5**
>
> **I – Interactive Learner Experience & Exercises**

This is the implementation stage of the model. In this phase the teacher/practitioner introduces the topic and its relevance can be presented with the support of any suitable previous experience/ examples/ illustrations/ newspaper reports/ videos/ film clippings etc., for connecting their prior knowledge to the new knowledge element and it will enable students to get an idea about what is to be learned. The

new learning experience can be provided by the learners in a flexible instructional environment by adopting methods such as to wit:

(a) Co-operative learning
(b) Collaborative learning
(c) Inquiry based learning
(d) Group Discussion
(e) Debates
(f) Panel Discussion
(g) Symposia
(h) Project based learning
(i) Problem based learning etc. The learning experience attained from any of these strategies/ methods helps to identify the students' ideas and interest about this topic.

> **Phase - 6**
>
> **Evaluate and Revise**

Finally, the teacher implements an online or off line assessment tool to evaluate the terminal behavior of the learners with regard to Education for Sustainable Development and Environmental ethics. E assessment tool can also have scope in this regard. This helps to evaluate the effectiveness of the developed instructional model (F-O-S-I-I-E instructional design model) This phase involves the implementation of various evaluative tools, for example,;.

1. Feedback from the resource person also helps students to attain the objectives.
2. Outcomes/products can be presented by learners individually or in groups.
3. Administration of a Terminal behaviour test (Post-Test) etc.

Revision Session

After assessing the effectiveness of the F-O-S-I-I-E instructional design model with the objective of inculcating and generating varied dimensions and aspects of Sustainable Development and Environmental Ethics, the teacher will give a follow up session and remedial sessions if anyone was not able to attain the core outcome or expected level of achievement. This proposed model is unique because it provides an opportunity to integrate new learning elements, tasks, process, procedures, transactional and assessment modalities at the convenience of the practitioner or the nature of the learner or structure of the learning materials or availability of learning materials and resources. The ultimate aim for working this model is to attain varied dimensions and aspects of Sustainable Development and Environmental Ethics, both the theoretical and practical sides.

Our Struggles and Constraints

There is a lack of knowledge about active learning methods and strategies and a lack of meta-cognitive knowledge at all levels of education for sustainable development and environmental ethics (Stocker & Burke, 2006; Smith, 2007; Zajda, 2010). Students in schools do not have enough meta-knowledge of learning about sustainable development. Active learning does not mean leaving students alone, but developing their capacities for critical thinking and empowering them to become active agents in changing the future.

Conclusion

Environmental ethics and education for sustainable development play key roles in the recognition of human-environment interactions. Modern environmental ethics is the philosophical re-thinking of modern human environmental behavior. Sustainable development implies harmony between human-environment interactions and intergenerational responsibility, with emphasis on a harmonious relationship among the population, resources, environment and development, in order to develop a sustainable and healthy foundation of resources and environment for future generations. The concept of open environmental ethics includes a respect for nature, care for individuals. The human race, and respect for the development of future generations. This means giving consideration to natural values, individual and human race benefits and welfare across generations. The formulation and development of environmental ethics that aims at education for sustainable development, can not only harmonize the relationship of population, resource, environment and economic development, but also guide behavior, advance social and political system transformation, strengthen the legal system, and raise environmental awareness of the public.

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Chapter 11
Discourses of Globalisation, Ideology, Education and Policy Reforms: Research Trends

Joseph Zajda (ID) **and Suzanne Majhanovich**

The topic of globalisation, and education reform has assumed immense importance in the discourse and policies of many bodies and agencies across the international arena. An increasing number of countries and governments have concluded that globalisation, education and policy research approach to learning and teaching should be instituted and deployed as one of the main lines of attack on some of the major problems needing to be addressed in the future. The policy documents and statements of the UNESCO, OECD, the European Parliament, the Nordic Council of Ministers, and the Asia – Pacific Economic Co-operation Forum (APEC) reveal a commitment to globalisation and education reforms. There are other regional alliances that are grappling differently with issues of anti- globalisation trends of Brexit, in the Global South, and in developing and underdeveloped nations also.

Current process of globalisation in education represents an on-going, complex and interactive ubiquitous force, affecting reforms in education policy, curriculum development and evaluation, and the quality of global standards in the performance culture (Carnoy & Rhoten, 2002; Schriewer, 2003; Johansson, 2018). As Schriewer (2003), argued earlier, 'It is undeniable that globalisation takes place as a large-scale, all encompassing process which, while conflict-laden and rich in contrary currents, is both the consequence and the correlative of modernity' (Schriewer, 2003).

From a critical theory perspective, globalisation has contributed to a new form of entrenched social stratification between the rich and poor economies (Milanovic, 2018). The dimensions of social inequality are essentially due to the impact of capitalist economy, privatisation/marketisation, and the rising inequity in the

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availability of funds among local education/regional authorities, because of differentiated economic and social differences between rich and poor regions. Regional inequalities in educational funding have an adverse effect on access to quality education. Some poorer rural regions are socially, economically and educationally disadvantaged, with little access to high-quality education. Current government policy of supporting best-performing schools, based on National examination results in secondary schools, will continue to have an 'adverse effect on access to quality education for all in those regions' (Dervin & Zajda, 2021, p. 7).

The ideological features of the globalisation discourse have been embodied in that of Bologna, as an education policy response to the global context (Guillén, 2000; Stiglitz, 2006; Steger, 2009; Zajda, 2020a, 2021) Because of the similarities of the two discourses, it could be claimed on one hand that the discourse is just moving levels, from the global to the national, as its main features, that is, competitiveness, flexibility and quality, remain unchanged. On the other hand, the continuous reference to social and cultural issues in the Bologna Process (BP) discourse could suggest that the adoption of the globalisation discourse is not blindfold and silent, but is a process of constant discursive recontextualisation. Finally, it seems, that the two discourses are neither similar to nor parallel to each other. But it appears that the BP policy discourse only makes sense, only has a need to exist in the terms, demands and patterns set by the globalisation discourse. Moreover, they stand with ideologically parallel features but these appear with different strength and force in their construction as discourses. (Kolokitha, 2016, p. 119).

With reference to quality control and standardization of degrees, the Bologna Process was designed to bring more coherence to higher education systems across Europe. It introduced a three-cycle higher education system, consisting of bachelor's, master's and doctoral studies. The system ensured the mutual recognition of qualifications and learning periods abroad completed at other universities. Kolokitha (2016) discussed the ideological features of the globalisation discourse impacting on the Bologna Process, as an education policy response to the global context (p. 119). It was noted that competitiveness, flexibility and quality, remained unchanged in the globalisation discourse affecting higher education.

Discourses of Globalisation, Ideology, Education and Policy Reforms

Drawing on Peter Berger and Thomas Luckmann's notion of internalisation, Brendan Hyde argues that Twenty-First Century learners are now born and socialised into a world through schooling in which globalised discourses of neoliberal performativity and responsibilisation are taken for granted as being the norm. He argues that these discourses have been socially constructed in the process of globalised education reforms by governments and educational institutions in their quest for excellence, quality, global competitiveness and comparative education data

analysis. The author discusses key notions in Berger and Luckmann's (1966) treatise, namely habitualisation and institutionalisation, which have relevance for our understanding and construction of reality. He compares critical and empowering educators like Freire (1972), Noddings (2003), Britzman (1986) and others with the neoliberal imperatives, dictating accountability, performance, standards and profit maximization (Zajda, 2021).

In their comparative research, Regnault Elisabeth, Copreaux Lucie, Landrier-Guéret Brigitte, Regnault et al. (2022) discuss the PISA effect on educational reforms in Finland and in France. The authors noted the existence of five educational patterns in the developed world:

- The Nordic pattern: Denmark, Finland, Iceland, Norway, Sweden. With a non-differentiated structure, a unified school system, the same subjects taught in junior high schools, no separation between primary schools and junior high schools, academic orientation at 16 - progress and building oriented - centred on general skills and know-how expected from the pupils and on the development of the personality.
- The Latin pattern: Brazil, Spain, France, Greece, Italy, Romania, Turkey. With a differentiated structure, a separation between primary schools and junior high schools, orientation at 14 (Turkey) or at 16 (France) and an academic structure based on national curricula split in subjects with numerous graded tests.
- The East-Asian pattern: Korea, Japan, China, Russia. With a mixed structure, a partially common structure in junior high schools, a separation between primary schools and junior high schools, an orientation at 16 and an academic orientation.
- The Germanic pattern: Germany, Austria, Belgium, Luxemburg, The Netherlands, Switzerland. With a differentiated structure and an academic orientation.
- The British pattern: Australia, Canada, the U.S.A., India, Ireland, Mexico, New-Zealand, the United Kingdom. With a mixed structure; progress-oriented.

   The researchers mention recommendations from the OECD surveys

- To give the pupil the prominent place.
- To have a constructive approach of the learning process thanks to active teaching.
- To favour cooperative relationships among the pupils.
- To develop friendly and safe links between teachers and pupils.
- To understand the teacher's part as a guide, a facilitator.
- To produce positive assessments.
- To associate an interdisciplinary and a collaborative learning, with the mastering of the knowledge required in every subject.

We now turn to a specific topic of race, as discussed by Freeman (2022) in 'African descendants' globalization challenges, human rights and education dilemmas across the African Diaspora'. She addresses the educational challenges and human rights abuses confronting Black populations. This, argues the author, must be done by utilizing the collective, and comparative experiences of Black populations globally, as well as an internationalist model. African descendants have demonstrated their

existence and similar conditions across regions and countries, the Caribbean, Europe, North and South America. They have also exhibited a growing solidarity, argues the author. More imortantly, Freeman argues for the need for a paradigm shift, of refocusing and/or shifting to a different paradigm:

> ...to examine the comparative, common educational experiences Black populations confront globally have gone largely misunderstood and under-examined. This perspective, utilizing a broader, cross disciplinary and cross boundaries approach, makes the case for African descendants' paradigm shift and new narratives from a Black Nationalist model to a Black Internationalist model to examine Black educational challenges globally (Freeman, 2022).

Developing an Education Planning Tool to Create the Conditions for Social Justice in a Global Village is discussed by Sigamoney Naicker and Ambalika Dogra (2022). They analyse the issue of inequality facing most countries and call for changing education systems, since education has the potential to become an important catalyst for change. They also stress the need for changing theoretical frameworks and practices that are the best for developing the conditions for equality and social justice.

In 'Coping with Globalisation and Disruption: The Making of Higher Education Reforms in Singapore' Michael Lee (2022) discusses education reforms in Singapore, and how features of globalisation, such as international rankings, quality assurance and international collaboration are expressed in the Singapore context. Lee concludes that considering higher education acts as a means for promoting upward social mobility, in line with the principle of meritocracy, it is also important for ensuring equal opportunity. Few other countries would have given such centrality to education, training and R&D, as what Singapore had committed.

Some researchers turn their attention 'craft pedagogy' in Japan. Mohammad Reza Sarkar Arani, Masao Mizuno and Yoshiaki Shibata examine Japanese craft pedagogy, as a lesson script process, whereby children present to each other the methods they have found for solving a problem and refine their ideas as a group. Their aim is to elucidate the *neriage*-based teaching script shared by Japanese teachers as tacit knowledge and to visualize, where visualization means to bring a focal awareness to the ethos and understanding that supports this, through analysis of three case-based studies of mathematics lessons from different time periods. The authors demonstrate how Japanese teachers learn to concern and integrate about *neri* and *age* in praxis and learn integrated together through school-university research partnership such as lesson study/analysis:

> If we trace the lens through which teaching has been understood (or view of pedagogical correctness) over time, it has evolved as such: 1) teacher-focused (*teacher is central.*), 2) teaching-focused (*teaching is central.*), 3) learner-focused (*learner is central.*), 4) learning-focused (*learning is central.*) (Sarkar Arani et al., 2022).

The topic diversity and global citizenship in educational policies is examined by Kathrine Maleq & Abdeljalil Akkari, who explore how social and political contexts have influenced the definition and operationalization of citizenship education and multicultural education in curricula and address the debates surrounding global

citizenship education (GCE) and identity in culturally diverse societies. The challenge for GCE is therefore to strike a balance between local, national and global belonging that ensures both national cohesion and a sense of global responsibility. The authors conclude by proposing that there is an urgent need for teaching global citizenship through youth engagement, which is connected with relevant knowledge and skills, such as creativity, critical thinking, communication skills and citizenship skills.

We now move to a case study, examining the influence of an international immersion program in Solomon Islands on Australian pre-service teachers' (PSTs) notions of global equity and justice. Mellita Jones, Renata Cinelli & Mary Gallagher discuss thematic analysis enabling comparison between data sets indicated the program's transformative and lasting program influences on PSTs' social justice understandings, actions and intentions. Findings highlight the potential of such programs to develop attitudes, intentions and capabilities for a socially just form of global citizenship amongst PSTs. Their findings support other research that indicates immersion experiences can benefit PSTs' personal and professional development in terms of expanded worldviews and global perspectives. Findings are also relevant in building the scholarship of global citizenship teacher education which has to date been more focused 'on the practical aspects of GCE [global citizenship education] rather than on the ideals it encompasses'. The authors conclude for a need to encouraging empathy and action as essential to addressing global inequity, and education is a key determinant for social change.

We now address the topic of education for sustainable development and environmental ethics. Issac Paul discusses the current state of education for sustainable development (ESD) as a powerful means of forming of new consciousness and behavior through which human development can shape the environment and thereby ensure sustainable living practices and thereby generate an environmentally ethical society. The author argues that the environmental ethics and education for sustainable development plays a key role in the recognition of the human- environment interactions. The formulation of environmental ethics that focuses on education for sustainable development, is likely to produce peace, good-will and global harmony:

> Modern environmental ethics is the philosophical re-thinking of modern human race environmental behavior. Sustainable development implies harmony on human-environment interactions and inters- generation responsibility, with emphasis on a harmonious relationship among population, resources, environment and development, so as to lay a sustainable and healthy foundation of resources and environment for future generations (Paul, 2022).

Evaluation

The current process of globalisation in education policy, reforms and curricula demonstrates an on-going, complex and interactive force, which affects all spheres of education reforms. One of the effects of forces of globalisation is that educational organisations, having modelled its goals and strategies on the entrepreneurial

business model, are compelled to embrace the corporate ethos of the efficiency, accountability and profit-driven managerialism.

Hence, the politics of education reforms in the twenty-first century reflect this new emerging paradigm of standards-driven and outcomes-defined policy change (Zajda, 2015, 2021). A number of education policy analysts have criticized the ubiquitous and excessive nature of standardization in education imposed by the EFA framework, and PISA indicators (Carnoy, 1999; Burbules & Torres, 2000; Popkewitz, 2011; Meyer & Benavot, 2013; Zajda, 2020b).

It is important to notice that current policy and education reforms globally, reflect dimensions of social, economic and educational inequality (Milanovic, 2006, 2018). This is partly due to the rising inequity in the availability of funds among local education/regional authorities, because of differentiated economic and social differences between rich and poor regions. Regional inequalities in educational funding have an adverse effect on access to quality education. Some poorer rural regions are socially, economically and educationally disadvantaged, with little access to high-quality education. Current government policy of supporting best-performing schools, based on National examination results in secondary schools, will continue to have an 'adverse effect on access to quality education for all in those regions' (Dervin & Zajda, 2021, p. 7).

With reference to the UNESCO report (2020) there is an urgent need for developing good quality education for achieving a more sustainable world. In the UNESCO's report *Sustainable Development* (2020) there are four dimensions to sustainable development: society, environment, culture and economy, which are interconnected. Sustainability is a paradigm for thinking about the future in which environmental, societal and economic considerations are balanced in the pursuit of an improved quality of life. Education for sustainable development (ESD) promotes the development of the knowledge, skills, understanding, values and actions required for creating a sustainable world, which ensures environmental protection and conservation, promotes social equity and encourages cultural and economic sustainability.

There exists a complex nexus between globalisation, ideology and education reforms – where, on the one hand, democratisation and progressive pedagogy is equated with equality, inclusion, equity, tolerance and human rights, while on the other hand, globalisation is perceived, by some critics at least, to be a totalising force that is widening the socio-economic status (SES) gap and cultural and economic capital between the rich and the poor, and bringing power, domination and control by corporate bodies and powerful political, economic and educational organisations (Fan & Popkewitz, 2020; Zajda, 2020c).

Conclusion

The above analysis of education policy reforms, and the resultant social stratifications in the global culture, demonstrates a complex nexus between globalisation, ideology and education reforms – where, on the one hand, democratisation and progressive pedagogy is equated with equality, inclusion, equity, tolerance and human rights, while on the other hand, globalisation is perceived, by some critics at least, to be a totalising force that is widening the socio-economic status (SES) gap and cultural and economic capital between the rich and the poor, and bringing power, domination and control by corporate bodies and powerful organisations (Milanovic, 2012). The on-going dialectic in education policy and reforms discourses captures the antinomies between critical and emancipatory educators and forces of neo-liberal ideology of accountability and performance. The educational goal of promoting and building authentic democracy, equality, social justice, and human rights that genuinely promote a transformative pedagogy, seems to be displaced (Zajda, 2021). Hence, we need to continue exploring critically the new challenges confronting policy makers, and educators, in the provision of authentic democracy, social justice, human rights, and cross-cultural values that genuinely promote a transformative pedagogy. We need to focus on the crucial issues at the centre of current and on-going education reforms, namely equity, social justice and human rights, if genuine culture of learning, and transformation, characterised by wisdom, compassion, equality, and intercultural understanding, is to become a reality, rather than a policy rhetoric.

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Index