Joseph Zajda
Lynn Davies
Suzanne Majhanovich
Editors

Globalisation, Comparative Education and Policy Research 2

Comparative and Global Pedagogies

Equity, Access and Democracy in Education

Springer

Comparative and Global Pedagogies

Equity, Access and Democracy in Education

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Comparative and Global Pedagogies

Equity, Access and Democracy in Education

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To Rea, Dorothy and Nikolai

Foreword

A major aim of *Comparative and Global Pedagogies: Equity, Access and Democracy in Education* which is the second volume in the 12-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda and his team, is to present a global overview of recent trends in equity and access in education globally. By examining some of the major education policy issues, particularly in the light of recent shifts in education and policy research dealing with equity and access, the editors aim to provide a comprehensive picture of the intersecting and diverse discourses of globalization, education and policy-driven reforms.

The impact of globalization on education policy and reforms is a strategically important issue for us all. More than ever before, there is a need to understand and analyse both the intended and the unintended effects of globalization on educational systems, the state, and relevant policy changes – especially in terms of equity and access, as they affect individuals, educational bodies (such as universities), policy-makers across the globe. Current education policy research dealing with equity and social inequality reflects a rapidly changing world where citizens and consumers are experiencing a growing sense of uncertainty, exclusion and loss of flexibility. Yet globalization exposes us also to opportunities generated by a fast changing world economy.

In this stimulating and important book, the authors focus on discourses surrounding three major dimensions affecting the equality/inequality debate in education and society: *hegemony, equity*, and *cultural capital*. These are most critical and significant concepts for examining and critically evaluating the dimensions of social inequality in the global culture.

Equity has come to mean that which, while upholding justice, is in the best interest of the individual and the community. According to Aristotle, an equitable person is someone who exercises a choice and does equitable acts, is not unreasonably insistent upon rights, but can accept less than his or her share. Such a notion of civil morality suggests that it is incumbent on all citizens, but especially those with means, to take less than they are entitled to so that others may have a sufficient amount.

Cultural capital, as coined by P. Bourdieu, defines dominant conceptions of what constitutes knowledge, knowing, and social value. Educational systems – schools,

colleges and universities, by upholding a single 'gold standard' of what it means to be knowledgeable, reinforce the differentiated achievement status of class groups, but also reward those who are conversant with implicit rules of dominant ideology. As such, cultural capital refers to success in schooling, largely dictated by the extent to which individuals have absorbed the dominant culture. As the editors explain, schools, in a sense, are markets wherein children enter with various stores of cultural capital that can be exchanged for enhancement of one's capital, and thereby, their life-chances. Cultural capital, as a significant dimension of educational inequality, continues to shape and influence children's lives and destinies globally – as discussed in scholarly fashion in this book.

The book as a whole focuses on the issues and dilemmas that help us to understand in a more meaningful and practical way the various links between education, social stratification and globalization. They include:

– The significance of the politics of globalization and development in education policy – their effects on cross-cultural perceptions of dimensions affecting equality/inequality debate in education and society: *hegemony, equity*, and *cultural capital*.
– The significance of discourses which define and shape the nexus between education, social stratification and globalization.
– The encroaching homogeneity of global culture, which has the potential to reduce adaptability and flexibility, and reinforce the status quo.

The perception of education policy research and globalization as dynamic and multi-faceted processes clearly necessitates a multiple-perspective approach in the study of education and this book provides that perspective commendably. In the book, the authors, who come from diverse backgrounds and regions, attempt insightfully to provide a worldview of significant developments in education, hegemony, cultural capital, and equity. They report on equity and access in education in such countries as Canada, Ghana, Hong Kong, Sweden, and elsewhere. Understanding the interaction between education, inequality and globalization forces us to learn more about the similarities and differences in education policy research and associated reforms in the local-regional-national context, as well as the global one. This inevitably results in a far deeper and richer understanding and analysis of the globalization and education *Zeitgeist*.

Clearly, the emerging phenomena associated with globalization have in different ways affected current developments in education and policy. Globalization of policy, trade and finance, for instance, has profound implications for education and reform implementation. On the one hand, the periodic economic crises 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 basic education for all. When the poor are unable to feed their children what expectations can we have that the children will attend school? Children from impoverished families are forced to stay at home to help and work for their parents; they simply cannot afford to attend school. The policies of the Organisation for Economic and Cooperative Development (OECD), UNESCO, the World Trade

Organisation (WTO), and the General Agreement on Trade and Services (GATS) appear to operate as powerful forces, which, as supranational organisations, shape and influence education and policy, yet they also deny the access of the less privileged to the assumed advantages of an expanding global society. One might well ask what are the corporate organisations doing to enhance intercultural sensitivity, flexibility and mutual understanding? And are those excluded by the demise of democratic processes really able to work together for the common good?

The editors and authors provide a coherent strategic education policy statement on recent shifts surrounding the major dimensions that affect equality/inequality debate in education and society: *equity, access*, and *cultural capital*. They offer new and exciting approaches to further explore, develop and improve education and policy-making on the global stage. In the different chapters, they attempt to address some of the major issues and problems confronting educators and policy-makers globally. The book contributes in a very scholarly way, to a more holistic understanding of the education and inequality nexus, and it further offers us practical strategies for combating educational inequality.

The book is rigorous, thorough and scholarly. I believe it is likely to have profound and wide-ranging implications for the future of education policy and reforms globally, in the conception, planning and educational outcomes of "communities of learning". The community-of-learning metaphor reflects the knowledge society, and offers us a very worthy insight into the way individuals and formal organisations acquire the necessary wisdom, values and skills in order to adapt and respond to change in these turbulent and conflict-ridden times. The authors thoughtfully explore the complex nexus between globalization, democracy and education – where, on the one hand, democratisation and progressive education is equated with equality, inclusion, equity, tolerance and human rights, while on the other hand globalization is perceived (by some critics at least) to be a totalising force that is widening the gap between the rich and the poor, and bringing domination and control by corporate bodies and powerful organisations. The authors further compel us to explore critically the new challenges confronting the world in the provision of authentic democracy, social justice, and cross-cultural values that genuinely promote more positive ways of thinking.

In this volume, the editors and authors jointly recognise the need for profound changes in education and society. They argue for education policy goals and challenges confronting the global village, which I think are critically important. Drawing extensively and in-depth on educational systems, reforms and policy analysis, both the authors and editors of this book focus our attention on the crucial issues and policy decisions that must be addressed if genuine learning, characterised by wisdom, compassion, and intercultural understanding, is to become a reality, rather than rhetoric.

I commend the book wholeheartedly to any reader who shares these same ideals.

Vice-Chancellor
Australian Catholic University

Peter W Sheehan AO

Preface

Comparative and Global Pedagogies: Equity, Access and Democracy in Education presents up-to-date scholarly research on global and comparative trends in equity and access in education globally. It provides an easily accessible, practical yet scholarly source of information about the international concern in the field of globalisation, access and social inequality. Above all, the book offers the latest findings to the critical issues in education, democracy and educational inequalities. It is a sourcebook of ideas for researchers, practitioners and policy makers in education, globalisation and social inequality. It offers a timely overview of current changes in education and social stratification in the global culture. It provides directions in education, and policy research, relevant to transformational educational reforms in the 21st century.

The book critically examines the overall interplay between globalisation, social inequality and education. It draws upon recent studies in the areas of globalisation, educational inequalities and the role of the State (Zajda, 2007; Zajda et al., 2006). It explores conceptual frameworks and methodological approaches applicable in the research covering the State, globalisation, social stratification and education. It demonstrates the neo-liberal ideological imperatives of education and policy reforms, and illustrates the way the relationship between the State and education policy affects current models and trends in education reforms and schooling globally. Various book chapters critique the dominant discourses and debates pertaining to the newly constructed and re-invented models of neo-liberal ideology in education, set against the current climate of growing social stratification and unequal access to quality education for all.

The book offers a critique of globalisation, and new dimensions of social inequality in the global culture. It is presented around three particular dimensions: equity, access and cultural capital, as these continue to be most significant dimensions defining social inequality in the global culture (see also Zajda et al., 2008).

The book explores the ambivalent and problematic relationship between the State, globalisation and social change. Using a number of diverse paradigms, ranging from critical theory to globalisation, the authors, by focusing on globalisation, ideology and social inequality, attempt to examine critically both the reasons

and outcomes of education reforms, policy change and transformation and provide a more informed critique on the Western-driven models of accountability, quality and school effectiveness. The book draws upon recent studies in the areas of equity, cultural capital and dominant ideologies in education (Zajda, 2005).

Equality of educational opportunity is difficult to achieve in highly stratified societies and economic systems. In 1975, Coleman (1975), and other have argued that education alone was not sufficient to overcome significant SES differences in the society divided along dimensions of class, power, income, wealth, and privilege. The difficulty of attaining social justice in the global economy is explained by Rikowski (2000), who argues that sustainable social justice is impossible on the basis of capitalist social forms. Globalisation, in most developing countries (the majority of humanity) is articulated in the form of finance-driven policy reforms concerning efficiency and effectiveness. Their effect on education systems is likely to 'increase' educational inequalities and access (Carnoy, 1999). Furthermore, a lack of emphasis on the relationship between policy, poverty and schooling, and the 'withdrawal of the state as a major provider in the field of education in many parts of the world' raise serious human rights and ethical questions (Soudien and Kallaway, 1999; and Zajda, 2005). The growth of global education policy hegemony defining accountability, standards, quality assurance, and assessment fails to respond to the changing relationships between the state, education and social justice in the global economy.

Equality of educational opportunities, labelled by Coombs (1982) as the "stubborn issue of inequality" (Coombs 1982, p. 153), and first examined in comparative education research by Kandel in 1957 (Kandel, 1957, p. 2) is "still with us", according to Jennings (2000, p. 113). Furthermore, the prospect of widening inequalities in education, due to market-oriented schooling, and substantial tolerance of inequalities and exclusion, are more than real. Access and equity continue to be "enduring concerns" in education (OECD, 2001, *Education Policy Analysis*, p. 26). The policy shift away from the progressive and egalitarian vision of education that characterised the 1960s and the 1970s has serious implications for human rights, social justice and democracy.

The general intention is to make *Comparative and Global Pedagogies: Equity, Access and Democracy in Education* available to a broad spectrum of users among policy-makers, academics, graduate students, education policy researchers, administrators, and practitioners in the education and related professions. The book is unique in that it:

- Examines central discourses surrounding the debate of cultural capital and social inequality in education
- Explores conceptual frameworks and methodological approaches applicable in the research of the State, globalisation and social inequality
- Illustrates how the relationship between the State and education policy affects current models and trends in schooling globally
- Demonstrates ideological imperatives of globalisation, neo-liberal ideology and the State

- Evaluates the ambivalent and problematic relationship between the State, education reforms and outcomes in education globally
- Provides strategic education policy analysis on recent shifts in education, and policy research
- Gives suggestions for directions in education and policy changes, relevant to democratic and empowering pedagogy in the 21st century.

We hope that you will find *Comparative and Global Pedagogies: Equity, Access and Democracy in Education* useful in your teaching, future research and discourses concerning schooling, social justice and policy reforms in the global culture.

Joseph Zajda, *Australian Catholic University (Melbourne Campus)*

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Contents

Foreword ... vii

Preface ... xi

Acknowledgements ... xv

Contributors ... xix

Part I Main Trends and Issues in Equity, Access and Democracy

1 **Globalization, Comparative Education and Policy Research: Equity and Access Issues** ... 3
Joseph Zajda

2 **Interruptive Democracy in Education** ... 15
Lynn Davies

3 **The Role of Education and Training in the Empowerment and Inclusion of Migrants and Refugees** ... 33
Janet Hannah

4 **Equity and Democratic Education in Ghana: Towards a Pedagogy of Difference** ... 49
George J. Sefa Dei and Riyad Shahjahan

5 **Access Denied: A Story of Resistance** ... 71
Teresa Van Deven

Part II Race, Gender, and Equity

6 **Race, Ethnicity and Gender in Swedish Education: Policy Discourses and Dangers** ... 89
Gaby Weiner

7 The Gender Agenda: The Limits and Possibilities of Global and National Citizenship Education 103
Harriet Marshall and Madeleine Arnot

8 Globalization, Education Reforms and Immigrant Students in Canada 125
Suzanne Majhanovich

9 Globalising the Universal: Equity, Policy and Planning 143
Christopher Williams

10 Teacher Candidates' Racial Identity Formation and the Possibilities of Antiracism in Teacher Education 167
Goli Rezai-Rashti and Patrick Solomon

11 Education for Equitable Outcomes or Educational Inequality: A Critical Analysis of UNESCO'S *Education for All* and the United States' *No Child Left Behind* Programs 189
Karen Biraimah

12 Gender and the Case of Girls' Education: Organizational Learning in International Development Agencies 203
Nelly P. Stromquist

Index 223

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Part I
Main Trends and Issues in Equity, Access and Democracy

Chapter 1
Globalization, Comparative Education and Policy Research: Equity and Access Issues

Joseph Zajda

1.1 Introduction: Globalization and Education

Globalization has fundamentally altered the world economy, creating winners and losers. Reducing inequalities both within and between countries, and building a more inclusive globalization is the most important development challenge of our time…Addressing these inequalities is our era's most important development challenge, and underscores why inclusive development is central to the mission of the UN and UNDP (Dervis, 2007, UNDP).

Globalization, marketisation and quality/efficiency driven reforms around the world since the 1980s have resulted in structural and qualitative changes in education. In their quest for excellence, quality and accountability in education, governments increasingly turn to international and comparative education data analysis. All 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, 2007, *Education Policy Analysis*, p. 8). 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, 2007, *Education at a Glance* – OECD *Indicators*, p. 6).

The OECD international survey presents an encyclopaedic view of the comparative review of education systems in 30 OECD member countries and 19 other countries, covering almost two-thirds of the world. At least half of the indicators relate to the output and outcomes of education, and one-third focus on equity issues (gender differences, special education needs, inequalities in literacy skills and income). For instance, with reference to completion of secondary education,

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as one of the outcomes of schooling, in 21 of 24 OECD countries upper secondary graduation rates exceed 70%. However, in Finland, Germany, Greece, Ireland, Japan, Korea and Norway graduation rates equal or exceed 90% (OECD, 2007, p. 44).

From the macro-social perspective it can be argued that in the domains of language, policy, education and national identity, nation-states are likely to lose their power and capacity to affect their future directions, as the struggle for knowledge domination, production, and dissemination becomes a new form of cultural domination, and a knowledge-driven social stratification. Furthermore, the evolving and constantly changing notions of national identity, language, border politics and citizenship, which are relevant to education policy, need to be critiqued within the local-regional-national arena, which is also contested by globalization. Current education policy research reflects a rapidly changing world, where citizens and consumers are experiencing a growing sense of uncertainty and alienation.

The above reflects both growing alienation and a Durkheimian sense of anomie in the world "invaded" by forces of globalization, cultural imperialism, and global hegemonies that dictate the new economic, political and social regimes of truth. These newly constructed imperatives in educational policy could well operate as global master narratives, playing a hegemonic role within the framework of economic, political and cultural hybrids of globalization.

1.2 Access an Equity Issues in Schooling

More equitable education and access to higher education needs to be 'widened to benefit all social groups', according to recent OECD findings (OECD, 2006, p. 14). Action is therefore needed thought education systems to 'tackle' the problem of more equitable education (OECD, 2006, p. 14). Our divided educational systems around the world, by means of their hegemonic structures, legitimise social inequality. In the class-conflict analysis, be it Marxist or neo-liberal, the education system is perceived to be a hegemonic knowledge management organisation in the learning society, or 'the dominant state ideological apparatus' contributing to cultural reproduction. Global inequalities in income and living standards have reached 'grotesque proportions' according to the 1999 annual United Nations Human Development Report (UNHDR). The report noted that economic inequality had been rising in many countries since the early 1980s:

> The countries of Eastern Europe and the CIS have registered some of the largest increases ever in the Gini coefficient, a measure of income inequality. OECD countries also registered big increases in inequality after the 1980s—especially Sweden, the United Kingdom and the United States. Inequality between countries has also increased. The income gap between the fifth of the world's people living in the richest countries and the fifth in the poorest was 74 to 1 in 1997, up from 60 to 1 in 1990 and 30 to 1 in 1960. By the late 1990s the fifth of the world's people living in the highest-income countries had 86% of world GDP—the bottom fifth just 1% (UNHDR, 1999, p. 37).

While 1.3 billion people struggled to live on less than $US1 a day, the world's richest 200 people doubled their net worth between 1994 and 1998 to more than $1 trillion. The world's top three billionaires alone possess more assets than the combined Gross National Product of all the least developed countries and their combined population of 600 million people.

1.3 The Global Futures and Global Social Stratification

Increasing global inequality is likely to produce conflict in the world. Polarization of societies is likely to increase, due to the unequal distribution of power, wealth, income, status, and education. Some of the new developments and indicators in global socio-economic stratification of income and wealth include:

- Global inequality is greater now than ever before. The richest 1% in the world receive as much as the bottom 57%.
- Top 5% earn more than the bottom 80%.
- In 2001 there were 7.1 million millionaires, whose total wealth was US$27 trillion.
- The wealth of 7.1 million individuals equals the total combined income of the world.
- The income inequality gap is increasing.
- The first study of global income inequality was done by Branko Milanovic (1999), Senior Economist from the World Bank. He surveyed 91 countries in the global village.
- The ratio between the average income of the top 5% and the bottom 5% increased from 78:1 in 1988 to 114:1 in 1993 (Milanovic, 2002).
- Four fifths of the world's population live below the poverty line.
- In 1996 the wealth of the world's 358 billionaires exceeded the annual combined income of half of the world's population.

In general, global social stratification is more visible today than ever before. The gap between rich and poor citizens, within both developed and developing nations, is also growing. The richest 2% of the world's adult population now owns more than half of global household wealth. The bottom half of adults own barely 1%. So the gains from global growth are being highly unequally distributed. What does this imply for those at the bottom? In 2007, over a billion people had almost no income (the equivalent of a dollar a day or less for each). They typically spent more than half of what they did earn on food for their families, leaving even less for shelter, water, education and health care (Dervis, 2007). According to PISA (2006) findings, students' socio-economic differences accounted for a significant part of between school differences in some countries. This factor contributed most to between-school performance variation in the United States, the Czech Republic, Luxembourg, Belgium, the Slovak Republic, Germany, Greece and New Zealand (PISA, 2006, p. 5).

1.3.1 Explaining Educational Inequality

Educational inequalities can be explained in terms of the following seven dimensions:

(a) Inequalities due to individual differences (meritocracy) or individual capacities reflecting *innate* abilities and efforts.
(b) Social factors or SES (socio-economic status), including social class inequalities, social background, family, and family origins. Social background is measured by parents' education (measured in years), the number of books in the home when the respondent was aged 14, wealth of the family etc. (*cultural capital*).
(c) Family differences-parental attitudes to education, parental values, encouragement given to children, material resources available etc.
(d) The school as a *reproductive* source of educational inequality (EI).
(e) Cultural/social reproduction theory: the education system as a mirror of society reproduces the existing class structure and the hierarchy of individuals, including the ruling power elite.
(f) Gender inequality.
(g) Ethnicity and inequality (groups from non-English-speaking backgrounds-NESBs).

1.3.2 Sources of Educational Inequality

Edith King (2005) believes that *classism* is a manifestation of discrimination and prejudice, which arises from the 'wide inequities in the distribution of wealth in a society' (King, 2005, p. 71). Both Edith King (USA) and John Polesel (Australia) Arnove and Torres (1999) examine the impact of social class, gender and ethnicity on educational inequality, and academic achievement. King (2005) argues that social class is the largest single dimension affecting children's performance in school. Polesel (2005) believes that gender and ethnicity continue to influence academic achievement in schools in Australia.

Access and equity continue to be enduring concerns in education globally (Teese and Polesel, 2003). A significant gap in access to early childhood education is documented in about half of the OECD countries. We learn that in some countries, fewer than half of children participate in the pre-school sector, ranging from over 90% in France to less than 5% in Turkey, with Australia (under 30%) in the nineteenth place (p. 46). Those who eventually complete secondary education have very different literacy levels, ranging from 10% to 60%. Finland had the highest literacy scores and the lowest under-achievement rate (10%), where as the United States and Poland had the lowest mean literacy rates (under 30%) and the highest under-achievement rates (60% and 50% respectively). The United States, with one of the highest upper secondary completion rates, has the 'second lowest mean literacy score' (OECD, 2001a, *Education Policy Analysis*, p. 50). Obviously some countries face serious challenges to 'raise or sustain participation rates' and to improve the 'quality of

outcomes' (p. 49). Equally startling is the fact that only a minority of countries have made "lifelong learning for all a reality", and that in most countries, lifelong learning is 'largely an unfinished agenda' (OECD, 2001b, *Education Policy Analysis*, p. 67).

As to equity and socio-economic background, students from high-income families continue to have much better access to tertiary education than students from low-income families. In France, 62% of the 15-year-olds coming from the poorest 20% of the families repeat at least 1 year in school, and in Germany only eight out of a 100 young people from a low socioeconomic background had access to higher education. In the UK, children from less affluent social classes represent 50% of the school population, yet only 13% of entrants to top universities (pp. 76–77). The International Adult Literacy Survey showed that in 14 out of the 20 countries that took part in the survey, at least 15% of all adults aged 16–65 performed at literacy level 1 – a level of competency too low to cope with the most basic tasks required in a knowledge-based society (OECD, 2001a).

1.3.3 The Digital Divide Pedagogical Issue

The OECD volume also shows that those without access to ICTs and without ICT skills are less and less capable in participating in the knowledge-based society may experience a new inequality of the *digital divide* kind. The highest percentage of households possessing a PC was in Denmark (63%), USA and Australia were almost equal with 50%, and Italy was 20%. The access to Internet was 46% for White and 23% for African-American households in August 2000, and as few as 3% of poorer households were on line, compared with 48% of the more affluent households (OECD, 2001b, *Education Policy Analysis*, p. 86). One of the conclusions drawn is that education policies are not sufficient to address the equity issue, and that "social inequalities existing outside the education system contribute to educational inequalities in terms of access, opportunity, process and outcomes" (p. 92). Despite the impressive expansion of participation in education, a relatively large part of the population, especially people from low-income families, remain excluded from access to education. Education policies to promote equal learning opportunities for all "can therefore hardly be seen as successful" (OECD, 2001b, *Education Policy Analysis*, p. 92).

1.4 Gender Inequality

Gender inequality is another dimension of social stratification and division of power. Gender inequality reflects the existing patriarchy. Using population adjusted cross-national data, and by employing social indicators covering economic, political, educational and health domains, current research conducted in the USA documents

persistent trends in global gender inequality. Dorius (2006) when evaluating global trends in gender inequality from 1970 to 2000, and using indicators covering economic, political, educational and health domains argues that absolute gender inequality *increased* among paid adult workers, surviving adults, literate adults, as well as total years of school attainment and life expectancy.

Gender inequality is also tied to issues of ethnicity, race, power, status, and class. Women are encouraged to develop skills that are useful in low-paying jobs, such as clerical work, which leads to lower income and status. The inability of many women to work fulltime and overtime due to heavy family responsibilities keeps them from keeping and advancing in their jobs (as most cannot find affordable childcare).

In contrast, the 2006 PISA findings indicate that in OECD countries, females outperformed males in reading literacy:

> In twelve countries, the gap was at least 50 score points. In Greece and Finland, females were 57 and 51 points ahead respectively, and the gap was 50 to 66 points in the partner countries Qatar, Bulgaria, Jordan, Thailand, Argentina, Slovenia, Lithuania, Kyrgyzstan, Latvia and Croatia…The smallest gender gaps among OECD countries were in the Netherlands and the United Kingdom (24 and 29 points, respectively)…In Korea, males increased their performance by 20 score points between 2000 and 2006, but females at twice that rate. In Finland and Korea, over 60% of females were at high levels of reading proficiency, Level 4 or 5, compared to just over one-third (36%) of boys in Finland and below one-half (47%) of boys in Korea (PISA, 2006, p. 51).

1.5 Gender Inequality Globally

1.5.1 Forms of Gender Inequality

Many women around the world face issues of gender inequality. Women share experiences of "economic discrimination, cultural isolation and social segregation" (Zajda, 2005, p. 134). Many women are caught in a vicious cycle of poverty and are unable to improve their current status in the above areas:

> Of the 625 million children of grade-school age worldwide, 110 million are not attending school. Two thirds of these children are girls. Obstacles to girls' education include patriarchy, poverty, gender biases, and cost of education, lack of female role models and cultural traditions and practices (www.unicef.org).

1.5.2 Women & Literacy

Worldwide, one in three women are illiterate compared with one in five men. In developing countries, one in two women are illiterate compared to one in four men. Overall more than 60% of the world's illiterate people are women. In developing countries illiteracy is more common because often a women's education is viewed as useless. Absenteeism and school drop-outs are common as girls face many cultural expectations.

1.5.3 Analyzing Gender Inequality

Gender is one of the most important dimensions of inequality, although it was neglected in the study of social inequality for a long time. Although there are no societies in which women have more power than men, there are significant variations in how women's and men's roles are valued within a society. Biological differences between women (they give birth and care for children) and men do not necessarily lead to gender inequality.

Why do gender inequalities exist? Some argue that differences in human biology (specifically, that women have children and can spend many years of their lives pregnant) cause *gender stratification* differences. Sociologists argue that environment itself, as well as cross-cultural and historical evidence show that gender inequalities are variable rather than constant. For instance, the functionalist perspective defines society as a system of interlinked parts and *roles* to be fulfilled in a particular social hierarchy. Talcott Parsons believed that stable, supportive families are the key to successful socialisation. In Parson's view, the family operates most efficiently with a clear-cut sexual division of labor in which females act in *expressive* roles and men act in *instrumental* roles. This perspective is still applicable to traditional and patriarchal societies that characterize much of developing economies. However, continuing social change, and the impact of development, science and technology (and knowledge in general) are likely to alter gender differences creating a more balanced gender patterns in the future.

1.6 Globalization, Comparative Education and Policy Research: Equity and Access Issues

The book chapters in *Comparative and Global Pedagogies: Equity, Access and Democracy in Education* analyze education policies, outcomes, differences in participation, and skill competencies demanded in the knowledge society. Only a minority of countries seem to be well on the way of making literacy for all a reality. For the rest, illiteracy, as confirmed by the OECD recent study, is largely an unfinished agenda (OECD, 2007, *Education Policy Analysis*, p. 67).

One of the aims of this volume is to focus on the issues and dilemmas that can help us to understand more meaningfully the link between education, policy change and globalization. *Comparative and Global Pedagogies: Equity, Access and Democracy in Education* focuses on such issues as:

– The ambivalent nexus between globalization, democracy and education – where, on the one hand, democratisation and progressive education is equated with equality, inclusion, equity, tolerance and human rights, and the other, globalization is perceived by some critics to be a totalising force that is widening the gap between the rich and the poor, and bringing domination, power and control by corporate elites.

- The influence of identity politics, gender, race, ethnicity, religion and class politics on education policy research and reforms.
- The significance of the politics of globalization and development in education policy – their effects on cross-cultural perceptions of such constructs as active citizenship, the nation-state, national identity, language(s), multiculturalism and pluralist democracy.
- UNESCO-driven lifelong learning paradigm, and its relevance to education policy makers globally.

Thus, it is likely to contribute to a better and a more holistic understanding of the education policy and research nexus – offering possible strategies for the effective and pragmatic policy planning and implementation at the local, regional and national levels. The book by examining some of the major education policy issues provides a more meaningful concept map better of the intersecting and diverse discourses of globalization, education and policy-driven reforms. Perceiving education policy research and globalization as dynamic and multi-faceted processes necessitates a multiple perspective approach in the close-up study of education and society. As a result, the authors in this book offer a rich mixture of globalization discourses on current developments and reforms in education around the world. Understanding the ambivalent nexus between globalization, education and culture – constructing similarities and differences in education reform trajectories is likely to result in a better understanding of the globalization process and its impact on educational institutions (Robertson et al., 2002).

The first five chapters in the part 'Main Trends and Issues in Equity, Access and Democracy', offer theoretical perspectives on the nexus between equity, access and democracy in education. In the first chapter, Lynn Davies explores the notion of interruptive democracy in education, and develops a theoretical perspective that intersects democracy, conflict analysis and values education. As a consequence Davies urges us to perceive education as a means for promoting a democratic society. She believes that only authentic and democratic schools would better prepare for active citizenship and for a strong civil society which are seen to be the foundation of a democratic state. This thesis is frequently addressed by other authors and it overlaps with the core issues raised in this volume.

Janet Hannah in 'The role of education and training in the empowerment and inclusion of migrants and refugees', discusses the likely contribution that education can make in empowering migrants and refugees, whether they are seeking temporary residence or permanent resettlement. Hannah reminds us that a substantial number of the world's refugees are housed in refugee camps situated in countries neighbouring the country of origin, and the chapter therefore examines the role of education and training in humanitarian emergencies. Hannah's discussion focuses upon the experience of migrants and refugees seeking temporary or permanent resettlement in major destination countries. George Sefa Dei and Riyad Shahjahan examine equity and democratic education in Ghana, focussing on the practice and pedagogy of social difference. It is based on the findings of a longitudinal study in selected Ghanaian educational institutions. Using a critical anti-colonial discursive

framework to theorize on the nature and extent of on-going colonial relations in schools drawing on the implications for knowledge production, subject identity formation and the pursuit of agency for resistance, the authors argue that a critical anti-colonial prism to understanding schooling practices offers possibilities for charting the course/path of educational change.

The authors argue that it is through a ‘pedagogy of difference’ that democratic possibilities in schooling can be realised. Finally, Teresa van Deven critiques the notion of resistance in Hong Kong, especially the resistance to mother-tongue education. She explores the historical, pragmatic and possible ideological reasons for this resistance. Until the policies concerning medium of instruction have been fully analyzed and addressed, students will be torn between the two worlds.

In the part ‘Race, Gender, and Equity’, there are seven chapters, where authors examine core issues surrounding equity, gender and race. Gaby Weiner, by focusing on a policy context, provides an overview, from the perspective of an outsider, of the impact of Sweden’s educational policy relating to equity issues, in particular gender and ethnicity. She argues that Swedish policy on gender and ethnicity in the post World War II period was driven as much by economic as social or welfare considerations.

Harriet Marshal and Madeleine Arnot analyse citizenship education and gender issues. They explore the English/Welsh model of citizenship education, which is contrasted with global citizenship education, gendered formulations of active citizenship. They suggest various policy strategies for overcoming cultural, economic and political marginalisation of women and implications for gender equality globally.

Suzanne Majhanovich develops further equity and access issues in her Canadian case study. She argues that issues of equity and access are a growing concern for those disadvantaged groups who are facing formidable obstacles in the new educational order. Public school systems have been radically changed when governments apply a neo-liberal agenda. By focusing on two outcomes of the accountability imperative; namely, the growth of standardized “high-stakes” testing, and change in financing formulas for school systems to realize economies, Majhanovich shows how they have a serious impact on the most vulnerable and the disadvantaged in public school systems, especially on new immigrants.

Christopher Williams offers a promising global perspective on equity, where he critically assesses the ‘universal’ ideology and related human rights codes, and identifies emergent precepts for equity, policy and planning in a globalising world. Goli Rezai-Rashti, on the other hand, focuses on racial identity formation, antiracist education and its effect on access to education for minorities. She examines race, racism and antiracism pedagogy in mainstream pre-service teacher education scholarship, how teacher candidates perceive and locate themselves as racialized beings, and discusses possibilities and limitations of a teacher education program in preparing student teachers in teaching for equity and social justice. This chapter also examines the extent to which a teacher education program can integrate issues of race, teacher candidates’ racial identity development and its potential impact on learning to teach for equity, diversity, and social justice.

Karen Biraimah evaluates the overall goals of UNESCO's *Education for All* (EFA) and the United States' *No Child Left Behind* (NCLB) programs, and concludes by questioning whether there is a "hidden curriculum" within both programs' constructive rhetoric that reflects an agenda far removed from the altruistic goals of EFA and NCLB.

Finally, in the concluding chapter, Nelly P. Stromquist critiques the case of girls' education in Organizational Learning in International Development Agencies. The author observes that while IDAs acquire new knowledge, it is done mostly within narrow parameters since few of these organizations tend to engage in boundary-crossing with other social actors in the developing countries. According to Stromquist, in the case of gender, an area that contests the status quo, IDAs have demonstrated a reluctance to learn the wide range of deep causes underlying power asymmetries between men and women. Often, the learning of IDAs is not theorized but rather limited to addressing a few obstacles facing women. Hence, they manifest, argues Stromquist, a willingness to examine "girls' education" but not "women's knowledge". She concludes that knowledge acquisition among IDAs remains inward looking, as there is a reluctance to approach the women's movement to learn more about their definition of gender in society.

1.7 Conclusion

The concepts of cultural and social capital have become significant for critical sociological research in the last 2 decades (see Bourdieu, 1986; Bourdieu and Passeron, 1977; Burbules and Torres, 2000; Zajda et al., 2008). The globalization processes taking place today are likely to legitimise the unequal distribution of cultural and social capital available. Given that cultural capital is one of the most valuable social commodities, it plays a significant role in social mobility, inequality and social stratification. It is argued that one of the best ways to prevent educational policy and practice from being a tool of totalitarianism or cultural imperialism is to broaden the discourse of democracy, by including critical literacy, access, choice, and equal opportunity. Understanding that education for democracy is more than "education for human rights," "education for tolerance," or "education for diversity" enables us to see that many national systems of education that are frequently assumed to be democratic actually contain some highly undemocratic aspects.

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Chapter 2
Interruptive Democracy in Education

Lynn Davies

2.1 Introduction

Globally, there are increasing arguments both for the democratisation of education and for the use of education to promote a democratic society. Clearly, these processes are linked. Democratic schools would better prepare for active citizenship and for a strong civil society which are seen to be the foundation of a democratic state. This chapter does not go into all the overall arguments for school-based democracy, which have been rehearsed before (e.g. Harber & Davies, 1997/2002; Limage, 2001). Instead it attempts to probe deeper into what form of democracy in schools or colleges is needed in an age of globalisation. The arguments arise from my work on conflict and education (Davies, 2004) which examines the role of educational institutions in either conflict prevention or conflict exacerbation. It uses complexity theory to unpack roots of conflict as well as derive new possibilities for the 'complex adaptive school'. The book argues that while there are inspiring examples of schools that engage in peace education or that work across various ethnic or religious divides, on balance the forms, structures, ideologies and purposes of formal education act to make national and international conflict more likely. From this comes the apparently paradoxical conclusion that schools need to foster more conflict within themselves – but positive conflict, which I term 'interruptive democracy'.

2.2 The Relationship Between Education and Democracy

Clearly, this relationship is complex in itself. Democracy and democratisation in any arena cannot be seen in a vacuum from the economy and the military regime. Essentially all countries in the world with per capita incomes below about $600 are authoritarian. The one exception is India. Military expenditure has a negative relation to democratisation. It could be that democracies spend less on the military and

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more on education; but World Bank economists such as McMahon (2003) suggest that rising income contributes to democratisation. Some regimes hang on longer with large military expenditure (North Korea?) but the eventual change over to fragile democracies from military dictatorships has been remarkable in the last 40 years in Latin America. The impact of secondary education is largest when there is a control for larger military expenditure, since the latter appears to contribute to rural poverty. The problem with all this analysis is however that these effects are *very* long term. Human rights increase by 8% in Africa on the average *40 years* after education investment is increased by 2% of GDP. Most impacts are long delayed. Thus simple connections between spending on education and the likelihood of democracy cannot be made; what would seem self-evident however is that authoritarian or oligarchic or market-oriented education is unlikely to challenge such tendencies in the state, short term or long-term.

McMahon (2003) claims nonetheless that education contributes to a larger and stronger middle class, to civic institutions and hence to greater political stability. In spite of a lot of overstatements of governments to UNESCO and other holders of statistics about enrolment rates and their country's investment in education, 'pure externalities' include lower population growth, strengthening the rule of law, more community involvement and greater dissemination of knowledge. (Interestingly, education is associated with less water pollution but more air pollution). However, what McMahon does not acknowledge is that all these positive effects are *internal* to a country, and ignore the effects on *other* countries of one country's growth or political stability. An 'educated' population does not necessarily challenge aggression towards another country, nor the source of their own economic prosperity through certain sorts of trade or imperialism. This is a vital omission in cost-benefit analysis of educational effects. As argued by Williams (in this volume), equity – and, I would add, democracy – needs to be seen cross-border, not just within a country.

Two questions then arise. Firstly, does expansion or lengthening of *any* sort of schooling help democracy? Or does it have to be democratic education in itself? Second, if democratic education is indeed more effective in shifting political culture, is it always effective in the directions desired? It was interesting that an adman for *Our Master's Voice* said in 1934:

> A democratic system of education.…is one of the surest ways of creating and greatly extending markets for goods of all kinds and especially those goods in which fashion may play a part. (quoted in Klein, 2001, p. 87)

Democratic education then – and now – can be seen simply as a way to sustain free markets and capitalist ethics. This is a dilemma which we have explored in relation to school leadership (Harber & Davies, 2003). If democratic leadership styles are more effective, are they also more effective in a terrorist training camp? Or do authoritarian goals require matching leadership or management styles? Our answer was that 'effective' leadership in any context would probably require a match between educational goals and management styles; but it would be an interesting piece of empirical research.

2.3 Critiques of Democracy

An additional complication is of the many versions or ideal types' of 'democracy' worldwide (representative or participative, conflict or consensus, secular or religious, neo-liberal or state-controlled). It can be used as a proxy term for other social goods such as equality – as can be seen in examination of the discourse of education plans and policies. Ginsburg (2001) in his study of Mexican teacher education contrasts procedural democracy (for example voting) and the more 'substantive' democracy – the degree to which material and symbolic resources are equally distributed, so that people can utilize their procedural entitlements. He also goes back to the distinction between 'public' and 'private' democracy, with the former implying active citizenship and the latter implying a more passive, indirect form.

In an earlier paper (Davies, 1999) I also compared definitions of democracy internationally, with regard to education, and examined some of the critiques of 'Western versions'. Elsewhere in this volume, there are similarly explorations of the limitations of neo-liberal versions of democracy which may act to reproduce inequality, for example sustaining women's second-class citizenship (Marshall and Arnot, this volume). Neo-liberal and civic republican agendas call on individual citizens to take responsibility for social renewal and cohesion, rather than the state. Neo-liberal versions can also be used to support free market agendas which can polarize wealth and poverty. It has been argued by western lenders (and endorsed through various conditionalities) that democracy is needed as the life support of globalisation, as a free market requires massive information to be circulated and unfettered initiative to materialise. Yet international agreements can be achieved without necessarily engaging in respect for human rights or equity. Only a particular and narrow version of democracy is adhered to.

There can be the association of democracy only with competitive electoral politics, not about broader social movements. As Waylen (1996) points out, conventional social science literature on democracy, democratisation and the role of social movements in transitions has by and large had little to say about gender relations. Top-down approaches with confine the process to political parties ignore the activities of women outside the formal political arena as well as the private sphere. This analysis of exclusion does not of course apply only to women, but can relate to a range of groupings.

Two positive aspects of globalisation have been an agreement on human rights and the spread of democracy, however interpreted (see Zajda, 2005). There has also been a widening and politicising of environmental concerns. Alex de Waal (1996) claims that India (unlike parts of Africa) has not suffered famine for more than 40 years, because it has a free press and democratic or adversarial political institutions which mean pressure on government to do something about it. Collier posits that 'democratisation is worth around half a century of income growth in terms of its contribution to peace' (1998, p. 18). This would be not just because of adversarial politics (far from it), but because of various sorts of participatory possibilities,

transparencies and procedural claims. Yet there is no guarantee that democracy will prevent armed conflict. The UK, France and Sweden are all supposedly democratic countries and yet will contribute to the arms race and to making conflict in other countries more likely. They have elected governments that need to stay in power and will do so by various means. From complexity theory we realise that non-linear political systems such as democracy can have unpredictable outcomes. The problem with the types of democracy that do not challenge the inevitability of war is that they do not have sufficiently active or recognized civil societies nor mechanisms for constant challenge and public accountability. It is not as if there is a silenced intellectual class – for the universities also make a living from 'defence' research. While there is then with representative democracy the possibility of electing or removing leaders, the major question for global survival is how we can elect leaders who are not hell bent on destruction.

Another contested version of democracy is that associated with decentralisation and local power-sharing (Zajda, 2006). But the connection is not direct. I enjoy the banners saying 'Join the World wide movement against globalisation': there is a tension of wanting local interactions yet needing wider networks. Some versions of globalisation (McDonaldisation) do not meet the needs of a country for creativity and for emergence from dependency. Hence the cry for decentralisation; but also for transparency and democracy in those local interactions, if international or national self-serving or corrupt elites are not to be replaced by local self-serving or corrupt elites. There is no guarantee that decentralisation will be any more democratic than central control. As always, the question is of monitoring and accountability: equality and entitlements may require firm legislation. In educational terms, there are certainly debates about for example whether student councils should be made compulsory by law so that student voices are heard – as they are in parts of Europe (Davies & Kirkpatrick, 2000).

In his discussion of complexity theory with regard to development, Rihani (2002, p. 165) interestingly dismisses democracy as 'too vague for the present purpose'. His critique seems to stem from the fact that democracy as a concept has been abused throughout history; that so-called democratic states act undemocratically outside their own territory; that there is a danger of oppression by the majority; that it is perceived as a Western concept that cannot be transplanted to other cultures. All this may be true, but this is the equivalent of saying we should not accede to notions of 'freedom' or to 'rights', because people use the notion of freedom or rights falsely and for their own ends. The problem is not with democracy (and rights) itself nor its underpinning principles; it is a problem of how it is used, taught, learned and interpreted (Davies, 1999). Thus while being alert to some of the issues and dilemmas associated with the different definitions of democracy, this chapter does not reject the concept or the vision, on the contrary: it argues for a particular version which tries to answer some of the tensions above. Simple representative democracy does not meet them. Even participative democracy can just be interpreted as consultations or 'having a say'. Consensus democracy has an appeal – the talking out of issues until agreement is reached; but in organisations such as educational institutions where there are definitely imbalances of power and large

numbers of people, there are dangers of who decides when consensus is reached, and on whose terms, and how much time is available. A much more assertive democracy is required.

2.4 Interruptive Democracy

In terms of enabling schools to counter negative conflict, my book develops the idea of 'interruptive democracy', which uses the notions of dialogue, encounter and challenge in order to promote positive conflict in educational institutions. Deep democracy is about the ever-present possibility of change. I define interruptive democracy as '*the process by which people are enabled to break into practices which continue injustice*'. It is an 'in-your-face' democracy – not just taking part, but the disposition to challenge. It is the democracy of the hand shooting up, the 'excuse-me' reflex, the outrage which goes with Oxfam's definition of the global citizen. It is by definition non-linear, finding spaces for dissent, resilience and action. For education, interruptive democracy combines five elements: a basis in rights; the handling of identity and fear; the need for deliberation and dialogue; the need for creativity, play and humour, and the impetus for a defiant agency. I look at each of these in turn.

2.4.1 A Basis in Rights

Underpinning interruptive democracy is the question of rights, which should form the bedrock of mutual understandings and reciprocities. Democracy presupposes the existence of three types of rights, political, economic and social: the right to participate in the political process; to enjoy a fair distribution of resources; and to be free from oppression (Zajda et al., 2006). In schools, these rights for learners are often not upheld. Students do not always participate in any depth in the major decision-making processes in the school; resources of teacher time, teacher approval and student self-esteem are not distributed fairly, but depend on narrow definitions of 'ability'; and students may be oppressed at best by petty rules and lack of autonomy in deciding their own learning paths and at worst by homophobia, by bullying, by sexual abuse (Leach et al., 2002). In our work on democratisation of teacher education we outlined four principles: equity, rights, informed choice and active participation in decision-making. All of these overlap, but all are essential. Participation without respect for rights can be non-challenging (there was massive popular participation in Hitler's Germany); and simply giving choices of voting without information is no real choice. Demanding rights without a concern for equity and reciprocity in those rights is also inimical to democracy.

The givens before looking at the other aspects of interruptive democracy are a rule frame and principles of subsidiarity, with rules decided at the level closest to

the learner. We have done much work on 'learning contracts' whereby learners think about what helps and hinders them from learning and devise a mutually agreed set of rules which all agree to adhere to (including teachers) (Davies et al., 2002). These normally include respect for others, coming on time, not interrupting, not putting people down, asking questions, helping when others need help or clarification and so on. In the years that we have been doing learning contracts with UK and international students in UK, and with students and teachers in-country such as the Gambia, it is remarkable how consistent these rules are across continents, ages and contexts. What is disturbing is still how some teachers and schools feel threatened by learners making their own rules, and how some teachers consistently break the common rules of dignity and respect for others while yet still demanding respect in return. Democratic practice in educational institutions requires both knowledge of rights (and therefore responsibilities) and practice in according and monitoring them. It also requires awareness that human rights education does not provide absolute answers, but only a framework for debate. Globalisation has helped here, but also, with greater migration of peoples, revealed issues about claims for cultural rights. This leads to the next question, that of identity.

2.4.2 Identity Building

In the arguments for civil renewal, there is much concern currently about social or community cohesion and about political apathy. The fragmentation, consumerism and individualism which is seen as a by-product of globalisation militates against strong community links and the sense of efficacy to create change (Zajda, 2005). Citizenship education or civic education are supposed to forge the responsible citizens who will build the bridges and restore community. However, there are the issues of who and who are not constructed as citizens, and the dangers of nationalism or patriotism. These dangers are seen to be averted through an emphasis on global citizenship, but this has the problems of vagueness of meaning in terms of what it means to be 'a global citizen'. It does not immediately give a sense of identity and belonging.

What emerges from studies of the roots of conflict is the paradox that a secure identity is needed in order to be less likely to be aggressive towards others; and yet that 'essentialising' of identity can equally be a cause of conflict. While it is convenient to be able to say that we should all acknowledge our multiple identities, it is not as simple as that. We do need a base to start.

Ozacky-Lazar (2001) argues in her work bringing together Jewish and Arab young people that you need to build internal culture. 'We realized that when someone is very sure about his/her own culture, it's much easier to meet the other side. We first build Jewish national identity – as Jews from whatever region. For Palestinians this is a serious problem. They've never had their own state, but identify themselves as Muslims, Christians or a minority' (p. 21). Initially one might feel uneasy about such culture building – could it not so easily spill over into nationalism? Yet it might be true that hostility comes from insecurity about one's

culture or nation, from the desire and need to prove and mark an identity. If one is secure, one can take a joke. If not, it is perceived as insult, which I return to later. Identities can be complementary, those that one wants to be engaged with; or a self can invoke a wholly alien other, with a voice that is heard as 'sickness, inferiority or evil' (Connolly, 1991, p. 64). As Cockburn points out, 'if you lack a secure self, are caught up in inner conflict, you are likely to disown the hated or feared parts of yourself and project them onto the unknown 'other' (p. 214). This can be seen from discussions of masculinity, where young men disown any tendency towards a female or homosexual inclination within themselves and react adversely or violently towards others who display such identities more obviously.

The clear message for a school community is to provide that sense of secure self which does not project deficiency onto others. It will not do this while it labels some pupils as low ability, or exclusionary material. The coercive labelling is actually getting worse in countries such as England under the targetting regime. We all fear failure, isolation, ostracism; but in schools this is played on by teachers and students alike. The result is *exclusionary* collective identities, rather than overlapping or cooperative ones. Schools are actually probably better at affirming cultural diversity than they are at affirming 'academic' diversity, as the latter is in fact impossible under any rationing or screening function. Yet the negative, fearful identities that emerge from this are those that are hostage to the securities of various sorts of fundamentalisms.

So while 'participation' is a hurrah word, this is not to be any old participation. Schools can provide spaces for pupils to 'belong', but interruptive democracy would enable the analysis of whether these groupings are benign or not. Belonging to the music club does not do much harm, mostly aiming to give pleasure; belonging to the youth wing of a fascist party does. Democracy is good on allowing for diversity in communities; but we should also acknowledge 'hybridity' within individual identity. This may entail multiple 'belongings', pyschologically and practically. The clue is to promote the belongings that do not by definition exclude. Identity *can* be forged by its relation and its distinction to somebody or something different; *but it does not always have to be*. Belonging to the top stream by definition is exclusionary, with identity secured by *not* being in any other stream, by being in contradistinction to others; but belonging to the UNESCO club does not mean an identity against 'non-UNESCO' people – on the contrary, the aim would be to draw in as many as possible.

The next part is then the handling of difference and diversity. Here there could be a debate with Cockburn. She argues that for democracy to work, universalism must transcend difference, defining all subjects as equal before the law. But she then says you need to 'reinstate' difference as a higher-order value which encompasses equality through 'a relational and dialogical ethic of care, compassion and responsibility'. Yet I am not sure why difference has to be a 'higher order value' rather than a parallel one: it seems to me the old rights-and-responsibilities dualism: rights are the universals, responsibilities acknowledge the differences. Democracy does not revert to cultural relativism, or 'anything goes', but – precisely because of the universal principles of rights and equity – is able to provide the mechanism to

question culture and difference when these appear to do harm. Democracy is not only a principled politics, but a practical one: built into the process is the means to mount a challenge when the differences get too big, and when the claims around diversity takes over from the common rights. This is the 'interruptive' part.

To avoid essentialism, the argument by Yuval-Davis (1997) is that we need 'transversal politics' rather than 'identity politics'. This denies that *social* positioning (for example, being a woman) can automatically be conflated with *personal* values (for example, being a feminist). Transversal politics, across very complex divides, is based on the recognition that each positioning (say, of an ethnicity, or gender) produces specific situated 'knowledges'; but that these knowledges *cannot but be unfinished* – and therefore dialogue should take place in order to reach a common perspective. Transversal dialogue should be based on the principles of 'rooting and shifting' – that is, being centred (rooted) in one's own experiences while being empathetic (able to shift) to the differential positionings of the partners in the dialogue. I think this notion of 'unfinished knowledge' is a crucial aspect of good democratic education: schools all too often present knowledge as finished (and individuals as lacking if they do not have it), rather than everything as tentative – even identities. There are strong parallels to Freire: 'Problem-posing education affirms men and women as beings in the process of becoming – as unfinished, uncompleted beings in and with a likewise unfinished reality' (2001, p. 77). A hybrid identity is also unfinished too, with hybridity not a complete form, but recombinant, in the genetic analogy. In dialogue, the key would seem to be to replace 'who one is' with 'what one's experiences are'. This sharing of experience and pain is crucial in dialogue across conflict lines.

The issues for education are to recognize subtleties and unfinishedness in complex identity, and not to portray the apparent 'absence' of one strand of a possible identity as an 'empty space'. There are no empty spaces, only different configurations. Atheism is a positive identity as much as religion. By providing avenues for voice, interruptive democracy in schools would constantly call into question who supposedly 'lacks' what in terms of learning and contribution.

The implications are for a 'critical pedagogy', or the 'border pedagogy' of Giroux (1991). A pedagogy of difference surfaces quite blatantly all aspects of our hybridity, and enables young people to analyse class, 'race', gender, 'ability' or 'special needs' in order to understand the sources of inequality and the sources of conflict. Carrim argues that an antiracist pedagogy of 'difference' would not compromise theoretical and academic rigour even if rationality is 'pluralised' and differences in meanings are allowed. This would, however, entail 'a more skills driven, instead of a content driven, form of assessment' (1995, p. 33).

So interrupting essentialist identities in schools is done through

- Surfacing and valuing hybrid identities in all of us (including teachers)
- Providing means to belong, but *not* giving essentialist or exclusionary academic identities, and particularly not 'empty' ones
- A good social science or political education curriculum which enables critical discussion of identity and difference, and of different experience across borders

- *Not* having a multicultural curriculum that presents cultures as finished and untouchable and impermeable by others
- A transversal politics of learning which means the constant responsibility of learners towards each other, through mentors, guardians, peer tutors, cooperative groups and so on

2.4.3 Democracy and Dialogue

It is clear that complexity requires information, feedback loops and connectivity; and that conflict resolution requires massive amounts of dialogue and talk. This is why 'deliberative democracy' would be the third part of the interruptive democracy that is being argued for here. The ideal of 'deliberative democracy' has received the attention of many writers and philosophers (e.g. Guttman & Thompson, 1996; Fishkin, 1991; Elster, 1998). Such writers focus on deliberation's potential for increasing political participation and the quality of democratic decision-making – and has parallels with the promotion of dissensus mentioned above. The idea is that by exchanging views with one another, citizens increase their attention to evidence. Conversations within 'discursive communities' are to produce wider access to more relevant knowledge, and reduce 'the role of shrill partisanship, ad hominen arguments and emotional appeals' (Lustick & Miodownik, 2000). When people 'talk past each other', they are not listening and trying to understand. But deliberative democracy means a public discourse of disagreement and agreement based on attempts at mutual intelligibility and evidence-based persuasion. This has obvious connotations for the spread of conflict or peace.

Lustick and Miodownik have used an interesting computer simulation called 'Agent-Based Argument Repertoire Model' to explore the effect of the interaction of different variables on the arguments held by individuals. It was found that low levels of education, modelled as citizens lacking the ability to understand more than a small fraction of the arguments being made by other citizens, are associated with high levels of pervasive disagreement. 'Even small amounts of education to marginally increase the flexibility of a citizenry's thinking could very significantly decrease the amount of misunderstood 'shouting' of arguments (p. 19). So it is not just any old education, but one that increases flexible thinking and a repertoire of arguments – not an education that is characterised by rote learning, passivity and portrayal of the one right argument. Without being able to communicate coherently about changing aspects of the polity, undereducated citizens cannot build the kind of substantial but not universal consensus that communities need 'to make use of the good ideas that a diverse polity generates' (p. 24).

The implication for schooling is to promote a particular type of deliberative democracy which will, through dissensus, lead both to second-order consensus and to the sense of agency which is needed to create change. This has avenues in the very practical structures such as School Councils, class councils, circle times, student unions or Youth Parliaments, as well as the formal curriculum areas of citizenship

education or political education. It goes without saying that both structural and curriculum areas can be utilised as means of control rather than positive conflict, and routinised school councils and nationalistic civics education do not operate in the spirit of deliberative democracy. But both teachers and pupils who genuinely want to open up criticality and agency will be able to find avenues within them, essentially linked to community activism and regional, national and international networking.

An interesting question is whether we should be looking at arguments or individuals.

> Most students of deliberative democracy focus on what citizens should be, what they do or do not do, and how they respond to discursive opportunities or messages.…we focus just as much if not more on arguments rather than individuals. Do arguments prevail, disappear, retreat or return? Are they available when conditions suggest their validity? What difference does the presence of more or fewer arguments within repertoires or within a polity make? Under what conditions do better arguments spread more quickly than poor arguments? (Lustick & Miodownik, 2000, p. 28)

This has huge implications for the spread of (or brake on) arguments for peace or conflict, or for the spread or decline of religious arguments. While individual citizens are born, develop into maturity and die, the arguments can live on, across space and across generations. Is citizenship education less about being a good citizen and more about keeping an argument alive? Perhaps they are not mutually exclusive: being a good citizen is modelling a behaviour which contributes to the perpetuation of a discourse, in structuration terms. But it may be important not just to help old ladies or to use one's vote, but to be able to argue persuasively for alternatives to war as effective ways of organising the world.

Dialogue (the two acts of speaking and listening) is actually about emergence: the bringing out of new and previously hidden meanings and understandings. But this occurs only if conditions are right – the rules and relationships, and the use of feedback. Talking has higher status than listening, which is relegated to acknowledging receipt of my words. But actually to talk effectively, and influence, we have to listen, in order to discover people's models of the world. Children are maligned as bad listeners, but in fact they listen very carefully, or rather monitor and scan – something learned from watching parents and then teachers. Apparently, we scan others' utterances for relevance – even people not talking to us directly.

Therefore Battram (1998) argues for 'dialogue groups' (which would be like circle times in schools) where the rules are fourfold: respecting the person who 'holds the context' at any point in a dialogue, or who is the 'problem-holder'; suspending the tendency to judge; listening and trying to understand rather than focusing on what you might want to say in response to what is being said; and treating everyone's views as equally valid (for now??) within the 'possibility space' of the dialogue. This dialogue is almost certainly non-linear, with tiny comments having disproportionate effects. If our personal view is augmented by a range of others in our community, this means we massively expand our 'possibility space'. All complex adaptive systems engage in constant searching, be they economies or organisations, ecosystems or individual organisms – they engage in environmental scanning

in the possibility space. Linked to this is the notion of 'growing' an idea or solution, rather than 'finding' it.

Just as biological diversity is essential for evolution, an unpredictable future demands argumentative diversity. We do not know what arguments we might need. Some may seem chronically wrong now, but they may, under vastly different conditions, be right tomorrow. So after resolving the identity paradox, the next task of interruptive democracy in a school or teacher education institution is to maintain the ideal of diversity of argument, through providing opportunities for genuine deliberation and for increasing the possibility space of thinking.

2.4.4 Creativity, Play, Humour and Anti-dogmatism

This leads on to the fourth element, of creativity. In 'fuzzy logic' terms, creativity is one of the 'fuzzy' components of a human complex adaptive system, together with willingness to engage in dialogue and willingness to act together. The components of creativity involve fresh ideas and new formulations (including metaphors, imagery, paradoxes, humour, jokes and story telling). This not only helps the enrichment and the variety of options, but begins the process of moving together in a group and acting together in a world where relativity, complexity and uncertainty are 'inevitable companions'.

Fresh ideas require reflection. Porter (1999) argues for the 'reflexive school' and the reflective teacher training college, which can enable young people to cope with globalisation and the threat to self-identity and even survival which comes from competitive economies that prevent democracies establishing a global consensus around human concerns and rights. Such reflexiveness requires acknowledgement of multiple intelligences and in particular, emotional intelligence. It requires a professional teaching force, not one that is deskilled and controlled. For Porter, decentralisation is essential, to provide a flexibility and creativity released from political agendas and dogmas, as well as for a more participant democracy.

Yet we need to establish how 'reflexivity' happens. As well as the furthering of emotional intelligence that comes from dialogue and encounter, I would argue for play and humour. In exploring humanitarian education, the huge importance of play in the process of healing is revealed; and the 'child soldiers' of so-called normal schools in normal societies also need this on a daily basis to counter hurt. It is significant that Adams (1991) analyses pupil protest as, in part, a 'game' – locating it with expressive rather than purely instrumental concerns. Protest as a game 'challenges the reality of the institutionalised process of schooling in several ways.' It is voluntary and superfluous, and may interrupt the competitiveness of the curriculum or reinforce it. Like play, protest is 'played out' with its own course and meanings. And acts of protest, once finished, 'become part of pupils' memories, and like other games, are transmissable as traditions' (p. 11).

The emphasis on humour is particularly important, and has been seriously (!) underplayed in educational and conflict literature. I put humour and fun as an

essential right for teachers and learners in a much earlier discussion of equity and efficiency in the school (Davies, 1990), and have also related it to one of the preconditions for dynamic stability in a country – the ability to take a joke about one's culture or religion or gender. It is the governments and religions that ban jokes about political or spiritual leaders that are clearly the most fragile. A sign of a healthy social system is a range of mechanisms for dissent and challenge, including satire, political cartoons and parody. A colleague in the Gambia had a theory of why the Gambia is relatively peaceful internally, and neighbouring Nigeria is not, and that was because people were able to make jokes about each other's tribes without taking offence. I think there are a host of other reasons as well, a lot to do with size, but it is crucial point: the inability to take a joke, to be teased, is a sign of insecurity. This can happen at a personal and at a large scale level. Blasphemy laws are a sign of a religion's deep insecurity and reluctance to countenance challenges. As Williams (2001) points out, it is impossible to eradicate the joke once told. This explains why political cartoonists may be imprisoned in authoritarian states. I would even claim a direct graph, that conflict escalates when the ability to use humour declines. The axis of evil versus the mocking of self.

Humour is a classic form of cultural interruption, and is a greatly undervalued and underanalysed device. Yet humour has some indispensable elements in democracy and peacekeeping. It can defuse tension, it can channel emotions, it can draw people together in a common joke, it can 'convey a truth safely', it can forge familiarity across normal power lines. Admittedly, it can also exclude people, if they are outside the shared joke or narrative; but on the whole, I would argue it has enormous potential. Cartoons and satire are a key means to criticise governments and give the message that politicians can be defrocked. Ditto teachers. Irreverence is an important skill – a skill that balances between rudeness and acceptance.

There is a long tradition of looking at pupil humour in schools (e.g. Woods, 1979), with the revelation that teachers' jokes are funny, but pupils' jokes are not funny. We may have lost that sociological tradition in UK. Humour is so important in identity and in challenges to power, as I found from my study of deviant girls back in 1984. Perhaps humour, rather than class conflict, is the last frontier for analysis. A friend headteacher told how one of the last bastions to fall to democracy in his school was the 'permission' to have a completely uncensored school newspaper. This was admittedly scurrilous, but it gave the staff a chance to realise what sorts of things students saw as ridiculous (he has written about democratisation of his school in Trafford, 1997). Humour is a key way of attacking power relations – the clown or court jester who can make jokes about royalty. We know that the teacher who is able to take jokes about themselves is more deviance insulative than the teacher who overreacts to pupil mockery. My research on pupil deviance showed the effective use of pupil humour to challenge the power of teachers (Davies, 1984). Humour demonstrates the possibility of many more lines of communication and uses of power than conventional organograms and line management charts.

This is not to say that everything should be joked about; nor that some jokes are not offensive, racist or sexist. There is a fine line between teasing and sarcasm.

Education for democracy includes awareness of when a style of communication is appropriate and when not. The dilemma of 'freedom of expression' has to be tackled in human rights curriculum, together with skills in the management of insult. (This relates to the need for a secure identity analysed earlier). Teachers and parents feel free to critique children in front of others; but when is the trading of insults acceptable? Humour has to be balanced with responsibility to others to 'save face'.

Humour then is more about irreverence than about putdowns (except of course of deserving politicians). Cockburn relates:

> Joy Poots and her partner were left wing, anti-nationalist and non-religious. But their children inevitably shared the Christian culture of the school and the 'Irishness' of the country. How to construct a satisfying culture for such a family? Their answer had been a kind of pragmatic multivocalism. She said 'We sing first, *Bandiera Rossa*, and next *Jesus Loves Me*, and then *The Fields of Athenry*'. It would be funny, they agreed, were it less serious. (p. 219)

I like the idea of 'pragmatic multivocalism'. The almost playful nature of pragmatism is important in avoiding essentialism, seriousness, great import and weight attached to aspects of identity. Women in Belgrade wrote in a letter to their sisters in Sarajevo about their shared resistance to the '....lethal belief in the *proper* name, *proper* land and blood....And that is a neat reminder: as women making over our worlds our first task is *impropriety*' (p. 230).

The most serious thing that humour can do is to attack dogma.

> This apparent need for order and truth blinds us to a more radical conclusion: it is not a particular false 'truth' that is the source of social evil; it is the notion of Truth itself. And it is not this or that invalid social dogma or doctrine that creates social injustice and dehumanisation: it is dogma and doctrine in themselves that are contrary to justice, equality and human possibility, and rob us of our freedom to think and act. (Murphy, 1999, p. 32)

This is within the tradition of 'humanist radicalism' which is also the central axis of feminist theory (Pettman, 1996). It requires a profound distrust of absolutes and ideologies – together with action. Not to act is not leaving things to chance, but to leave it to other actors.

2.4.5 The Doing Word: Agency

The components of interruptive democracy so far (rights, identity work, deliberation and creativity) are not then enough without this disposition to act. Interrupting dogma within the school is logically linked to the capacity to protest in a range of arenas. Salmi reports confidently that 'authoritarian governments have been overthrown, for instance in Korea and Thailand, as a result of student protest' (1999, p. 12). This cannot surely be the only cause of government decline, but does it give grounds for hope and agency?

Adams (1991) analyses the responses to student protest within the educational context, and identities four categories: *denying the reality* (a symptom of adolescence); *suppression* without dealing with the underlying causes (tightening

discipline, bringing in the police); making *token* or minor changes (token democracy); and making *significant* change. For the last category, Adams claims that it is hard to find a case where significant change has been initiated by teaching staff as a response to pupil protests. This may be shifting now, with the growth of more-than-token school councils which can provide an avenue for grievance without students having to resort to protest. Conversely, councils can be seen as yet another form of subtle social control. Adams therefore distinguishes 'democratisation' and 'empowerment'. The former he locates as a 'consumerist' strategy – school-site management, collaborative management, parental involvement, school councils, parental choice, revolutionary committees in China. Empowerment on the other hand means increasing the rights of pupils – to complain and to respond to complaints; changing the curriculum; and extending the repertoire of strategies and tactics of protest. Taking a Freirian approach, he argues for pupils to be conscientized, given power as well as rights, which implies also the empowerment of teachers. My interruptive democracy is therefore closer to his empowerment, and distinctly not about the liberal or market versions implied by a consumerist democracy.

For Byrne (1998), the idea of citizenship must include within it the possibility that the political actions of citizens matter in terms of determining the course of events. He claims that increasingly this is not true. There is a crisis of political engagement, both in terms of visible actions by people, most notably in the decline in voting, and in relation to the actual content of politics itself. Labour is seeking

> to replace the deliberative democracy of its annual policy forming conference with a combination of fan club rally and 'policy forums' [sic]. …In these processes the citizen who acts becomes replaced by the passive consumer whose action is confined to choice among available product suppliers, with the produce being distinguished by superficial packaging rather than essential content.' (p. 151)

In contrast, interruptive democracy and action would stem from the engagement or outrage mentioned earlier, not just from passive 'choosing'. So perhaps every day we should do a small thing, try to make a small difference to someone or something. We are trying to persuade UNESCO to institute 'Making a Difference' awards in their Associated Schools, so that students can think about the short and long-term impact of actions on the community and have some recognition (Davies et al., 2003).

In education, a particular form of critical pedagogy becomes the key to a disposition to act. Apple (2002) describes teaching immediately after 9/11 and how he wanted his students to appreciate fully the fact that the US-led embargo of Iraq had caused the death of thousands upon thousands of children each year that it had been in place. He wanted them to understand how US policies in the Middle East and in Afghanistan itself had helped create truly murderous consequences. However, he realised too that unless their feelings of anger and their understandings were voiced and taken seriously, the result could be 'exactly the opposite of what any decent teacher wants'.

> Instead of a more complicated understanding of the lives of people who are among the most oppressed in the world – often as a result of Western and Northern economic policies…students could be led to reject any critical contextual understanding largely because the

> pedagogical politics seemed arrogant. In my experiences both as an activist and a scholar, this has happened more often than some theorists of 'critical pedagogy' would like to admit. (p. 4)

Fortunately, the majority of students were willing to re-examine their anger, to put themselves in the place of the oppressed, to take their more critical and nuanced understandings and put them into action. A striking result was a coalition of students being forced to engage in concrete action in their own schools and communities to interrupt the growing anti-Islamic and jingoistic dynamics that were present even in progressive areas.

These 'politics of interruption' are significant at these key bifurcatory points induced by crisis, which can lead *either* to greater jingoism/patriotism *or* to greater understanding of global interdependence. Elsewhere, Apple (2000) has argued that social criticism is the ultimate act of patriotism. Rigorous criticism of a nation's policies demonstrates a commitment to a nation itself. It says that one demands action on the principles that are supposedly part of the founding narratives of a nation and that are employed in the legitimation of its construction of particular kinds of polities. It signifies that 'I/we live here' and that this is indeed our country and our flag as well. No national narrative that excludes the rich history of dissent as constitutive part of the nation can ever be considered legitimate.

This is a very important point. Agency and criticism can show care, not just resistance. They are a very important part of positive conflict. Teachers need to do the 'daring acts', to model and act out such protest if their schools are genuinely going to interrupt negative conflict outside. This may seem highly risky, but risk is an essential part of critical action. As Murphy points out,

> Growth is dependent upon our willingness to risk…Human life without constant risk is morbid, degenerative, less-than-human.…And risk has nothing to do with cost/benefit analysis.…Risk is a question of values, not acquisition. Every decision of risk is a choice of values.…(1999, p. 26)

2.5 Conclusion: The Interruptive School

Education on its own will not solve world peace. Nor will a school be able to heal and control children living in violent or drug-related communities. I am not over-romanticising the possibilities for schools. But I do think they can interrupt the processes towards more instability and violence. Putting all the above together, the features of the interruptive school are tenfold:

1. The existence of a wide range of forums for positive conflict (councils, circle time, representation on governing bodies, representation on curriculum committees, going to Youth Parliaments, support for school student unions).
2. The provision of organised and frequent ways to generate dialogue, deliberation, connectivity, argument, information exchange, empathy, feedback and listening between students, between teachers in front of students, and between teachers and students *as encounters between equals*.

3. The encouragement of avenues for belonging which are not exclusionary or segregated, and the promotion of identity which values hybridity, not purity.
4. A critical pedagogy and political education which surfaces inequalities such as class, ethnicity, gender and (dis)ability as well as global inequality, and which contains language and media analysis.
5. An emphasis on rights, and active responsibilities to other learners.
6. The learning of conflict mapping and conflict resolution skills and dispositions (for students and teachers) which lead to new behaviours and new reflection.
7. The acknowledgement of unfinished knowledge and unfinished cultures, of fuzzy logic.
8. Creativity, play and humour, both to heal people and to interrupt dogma.
9. The modelling by teachers of protest and resistance, of imperfect duties, of sins of commission, and encouragement of students to exercise agency against injustice.
10. Risk taking and limit-testing which pushes the school towards the edge of chaos, in complexity terms, that is, towards creative emergence.

There are schools or colleges across the worlds which do some or all of the above; but they are by no means enough at the moment. The argument from conflict studies is that for global survival, educational institutions will have at least to stop doing harm and at best teach people to interrupt the forces which act against peace, stability and development. New, more assertive forms of democracy are needed for this task.

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Chapter 3
The Role of Education and Training in the Empowerment and Inclusion of Migrants and Refugees

Janet Hannah

3.1 Introduction

International migration has reached historically unprecedented levels, and since global mobility and complex humanitarian emergencies show little evidence of abating, is set to remain at high levels for the foreseeable future (Zetter et al., 2003). Migration has become a contentious political issue, rising higher on the political and media agendas of major destination countries. Recognising its economic, political and social significance, international bodies and national governments are adopting more co-ordinated policies to manage migration and asylum, and to facilitate integration. A number of countries operate targeted resettlement programmes for migrants and refugees that seek to facilitate their successful integration into the host society (Colic-Peisker & Waxman, 2004). Notwithstanding these efforts, a recent study of international migration reported that the upward trend in international migration into the world's richest countries since the mid-1990s has been accompanied by "persistent integration problems" (OECD, 2004).

Education plays a crucial role in the integration process, being a key site in which both the host and incoming populations learn with, and about, one another. Education systems are therefore placed under scrutiny in terms of the extent to which they facilitate intercultural understanding and inclusion, and judged by the educational performance of migrant and refugee children in comparison with the host community. Education is therefore seen as a key site for both the promotion of empowerment and inclusion, and the measurement of its achievement.

This chapter explores the contribution that education and training can make in empowering migrants and refugees, whether they are seeking temporary residence or permanent resettlement. A substantial number of the world's refugees are housed in refugee camps situated in countries neighbouring the country of origin, and the chapter therefore examines the role of education and training in humanitarian emergencies. Thereafter, the discussion is focused upon the experience of migrants and refugees seeking temporary or permanent resettlement in major destination

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countries. Drawing upon evidence from European and other major destination countries which are members of the Organisation for Economic Co-operation and Development (OECD), the educational performance of migrant and refugee children in public education systems is considered. There is no comparable body of data on which to analyse the education and training experience of adults, but existing research undertaken by the author and others is drawn upon to identify key factors affecting access to, and experience of, education and training. First, however, it is important to explore how the terms migrant and refugee are commonly defined, and how these are conceptually and practically challenged by the increasingly complex international situation.

3.2 Defining Migrants and Refugees

The term immigrant is generally used to describe a person arriving in a country with the intention of staying for a period of at least 2 years, and the term emigrant applied in the same way to a national going to live abroad (Castles et al., 2002). However, as the flows of people in and out of countries have become larger and increasingly complex, the use of these terms has become more problematic. As Glover et al. point out, to view "the migration decision" as a one-off is a conceptual trap. "In practice, people migrate for economic, family or other reasons: they may initially intend to stay temporarily and then return or move on to a third country, or to settle; in any of these cases, they may subsequently change their minds and do something else" (2002, p. 3). Consequently, it is becoming increasingly common for the term migrant rather than immigrant, to be applied in the literature (Rudiger & Spencer, 2003; Castles et al., 2002), and for consistency, the term migrant is used here. However, it should be borne in mind that this chapter is primarily concerned with longer-term and permanent settlers.

Although there may be compelling economic or social reasons for moving, migrants do so voluntarily and are likely to have access to resources. In contrast, refugees are forced to seek asylum in another country as a result of, in the words of the 1951 Convention "a well-founded fear of persecution because of his/her race, religion, nationality, membership in a particular social group or political opinion; and is unable or unwilling to avail himself/herself of the protection of that country, or to return there, for fear of persecution." The assumption underpinning the 1951 Convention is that the State is the likely perpetrator of the persecution, and the continuing relevance of this definition to the contemporary world order is under challenge as non-State "agents of persecution" are increasingly responsible for humanitarian crises (Zetter et al., 2003). Thus, the causes of forced migration have become more complex and the boundaries between migrants and refugees correspondingly imprecise. A number of countries have therefore introduced differentiated forms of legal status and associated rights to grant temporary humanitarian protection to those who have a compelling case, but do not strictly meet the criteria of the 1951 definition (Joly, 1996). Meanwhile, some migrant workers are de facto

refugees who have not sought refugee status. Whether migrants or refugees, some will be planning to move back to their original or a third country in due course, and others will be planning permanent resettlement. Migrants and refugees therefore do not constitute two separate and distinct categories, but should rather be seen as forming a continuum encompassing various types of legal status, personal circumstances and future intentions. Nevertheless, a variety of personal and legal circumstances will impact upon the individual's willingness and ability to adapt to life in the new country and, in this respect, the distinction between voluntary migrants who plan and prepare their move and are free to leave at any time, and forced migrants and refugees who have experienced flight and trauma and for whom return is not an option, is vitally important.

Refugees often experience physical and psychological problems emanating from the factors which prompted their flight (intimidation and torture), the circumstances of their flight (hazardous journeys) and the conditions they encounter in the host country. In some cases, the pre-arrival experience will have been so traumatic that work or study is out of the question and a lengthy period of rehabilitation involving medical care and counselling may be necessary. The integration of refugee children into school will be particularly challenging, and the sensitivity of teachers and the support of specialist psychological and other services will play an important role. In some cases, children may require a period of home tuition before they are ready to attend school. Some time may elapse before adult refugees are in a position to seek employment or further study, particularly if they are suffering from physical or psychological problems. Various international studies of refugee resettlement substantiate this (Carey-Wood et al., 1995; Refugee Resettlement Working Group, 1993).

The after-effects of torture or trauma commonly cause physical or psychological symptoms, disrupting the ability to concentrate or study. If a refugee launches into education, training or employment too soon, the inability to cope and make progress will compound the lack of self-confidence and sense of hopelessness. To minimise the danger of this, it is vital that refugees have access to adequate torture and trauma counselling and are properly advised about their readiness to undertake study or employment. Specialist medical services for those who have suffered trauma and torture is provided in a number of major destination countries, including the Medical Foundation for the Care of Victims of Torture in the UK, and the Service for the Treatment and Rehabilitation of Torture and Trauma Survivors (STARTTS) in Australia, which provides specialist counselling services and employs a specialist education and employment officer to provide advice and practical support to clients seeking employment or study (Hannah, 2000).

3.3 The Right to Education

Children's access to education is internationally recognised under various legal instruments as a human right, and the 1989 Convention on the Rights of the Child (CRC) requires that the ladder of educational opportunity be "available and

accessible" to every child; with access to school compulsory, available and free for all children. The development of different forms of secondary education, including general and vocational education, is encouraged and "higher education" should be made available "on the basis of capacity by every appropriate means" (UNHCR, 1995). It requires that education must be available and accessible to all children within a State's jurisdiction "without discrimination of any kind, irrespective of the child's national, ethnic or social origin, or other status" (article 2). The CRC effectively overrode previous, often less favourable entitlements to education for children, including the 1951 Convention Relating to the Status of Refugees, Article 22. Beyond compulsory schooling, however, equity ceases to be an unequivocal obligation. Contracting States are expected to "accord to refugees treatment as favourable as possible, and, in any event, not less favourable than that accorded to aliens generally in the same circumstances" (ibid). For adults residing in host countries, access to education and training is largely determined by national laws governing rights of residence and citizenship. Consequently, access to publicly-funded education and training is highly uneven between countries, but Non-Governmental Organisations (NGOs) in major host countries often play an important role in providing opportunities to those unable to access the public system (Hannah, 2000). NGOs and other specialist agencies can also offer highly targeted provision that caters specifically for migrants and refugees, particularly the most vulnerable and excluded, acting as a bridge to the formal, public sector (ibid). NGOs also play a key role during humanitarian emergencies, considered next.

3.4 Education in Humanitarian Emergencies

The World Education Forum held in Dakar in April 2000 affirmed the crucial role that education plays "to meet the needs of education systems affected by conflict, natural calamities and instability", and incorporated the pledge in a Framework for Action adopted in pursuit of the objectives of Education for All (Sinclair, 2002). Donors now recognize that education provision in refugee camps serves many purposes, providing structure and a degree of continuity in the daily lives of the children, providing important psychological support. Community and cultural identity is maintained in an alien and perhaps hostile environment, retaining a sense of purpose and dignity in a situation that can all too often breed a sense of hopelessness and despair. Optimism about the future can be promoted by providing education and training in anticipation of reconstruction, and social and economic development, breaking the cycle of poverty breeding violence, breeding poverty. Skills for conflict resolution and peace-building, and positive attitudes towards citizenship, and can be built into the curriculum. The involvement of the refugee community in the design and delivery of education programmes for both children and adults has become increasingly recognised as an important factor in overcoming the dependency that often results from prolonged periods in refugee camps (ibid). In the most challenging of circumstances therefore, educational provision in refugee camps can

make an enormous contribution towards the promotion of access, equity and democracy.

Although children's access to education is internationally recognized as a human right, this can be obstructed by political reluctance or simple lack of capacity, and represents a particular problem for poorer countries with weak infrastructure and resources experiencing large influxes. Even in the most difficult conditions, however, a combination of political will and careful planning can yield durable solutions, as demonstrated by the Self-Reliance Strategy (SRS) operating in Uganda, a country with an estimated refugee population of approximately one-quarter of a million. With its emphasis on development rather than relief, the SRS promotes empowerment, enabling refugees to build their self-confidence and become self-reliant "through gaining skills and knowledge to both take back to their home countries when they return, and to leave behind sustainable structures" (Dryden & Peterson, 2003). The SRS provides opportunities for adults to develop skills relevant to sustaining livelihoods during the period of exile, but also upon return to the home country. The principle of education for repatriation commonly underpins education and training programmes in refugee camps where the expectation is that inhabitants will be voluntarily repatriated in the future. As discussed below, an important and generally overlooked issue in relation to the advice and guidance for migrants and refugees is how they reconcile education and training to promote their temporary integration into the local labour market, with skills likely to be relevant to the labour market in the home country after repatriation.

For the remainder of this chapter, the discussion shall focus upon the experience of migrants and refugees seeking temporary or permanent resettlement in a host country. As stated earlier, the intended policy outcome of more managed and integrated approaches to asylum and migration is the successful economic and social integration of migrants and refugees. However, this raises fundamental questions about how integration is to be defined, and the means by which migrants and refugees are empowered to assume their role in society. In turn, this opens up wider debates about the nature of society, cultural diversity and identity.

3.5 Empowerment and Inclusion

Empowerment is a somewhat nebulous concept for which there is no universally-accepted definition. Stripped to its essentials, however, it tends to be associated with the willingness and ability to realise one's potential and action positive change. Education has historically been viewed as a crucial site for the empowerment, or disempowerment, of individuals and society (Illich, 1973; Freire, 1995). The framework developed by Day (1999) to investigate the extent to which women's participation in employment training programmes generated a sense of empowerment in participants is also useful in relation to migrants and refugees. On the basis of the existing literature on the topic, she summarized the constituent elements of empowerment as: knowledge, conation and transformations. Knowledge

is seen as having three sub-categories: practical, self-knowledge and contextual. Practical knowledge can be viewed as "potentially useful", and is identified by writers such as Habermas (1971) and Mezirow (1991) as technical/instrumental or subject-oriented knowledge. Self-knowledge "describes knowledge in the affective domain, and is a broad term which includes: social skills and abilities, self-confidence, personal growth and development (Day, 1999). Day classifies the third category as contextual knowledge, recognizing that the concept has been labelled cognitive by some writers such as Mezirow and contextual by others including Shor (1992). "Both terms refer basically to conscious awareness of personal and life situations in relation to people's environments, working climates, and society at large" (Day, 1999, p. 107).

Conation is identified as the second constituent of empowerment, and is identified as a conscious desire to act. Snow and Jackson's (1992) list of the attributes of conation is comprehensive, but those that would appear to have particular resonance for migrants and refugees are: belief in one's abilities, persistence, will to learn, and attitudes towards the future. The backgrounds and experiences of students will combine with the characteristics of the educational provision to create a dynamic balance unique to each learner. This underlines the importance of treating migrants and refugees as individuals in assessing their needs and appropriate levels of support, and is discussed in more detail below.

Taking action (transformations) based on knowledge is the third significant component of empowerment. Mezirow (1991) argues that taking action is part of transformative learning, and Freire (1995) also sees taking action – especially taking collective action - as an indication of emancipation of oppressed or disadvantaged people. Evidence of willingness to take action (transformations) is found in UK studies showing that, relative to the general population, a high percentage of asylum seekers and refugees engage in voluntary activity (Department of Work and Pensions, 2003). The most common voluntary activities reported were supporting other asylum seekers and minority groups by providing interpretation and translation services, or advice and advocacy (Bloch, 2002). These activities require high levels of English language proficiency, as discussed below.

The challenges posed by settlement in a different country will be influenced by a wide variety of factors that will vary according to individual circumstances, but are likely to include the extent to which the two societies share linguistic, ethnic and cultural similarities. It might therefore be expected that the settlement experiences of a Canadian in the United States will be different to those of a Somali settling in Finland. Acculturation, or the process of adjustment to life in a different culture, involves a complex interplay of factors including orientation towards one's own ethnic group, and to the larger society. From this perspective, integration can be understood as the extent to which cultural identity can be maintained whilst participating in wider society (Castles et al., 2002). However, the term integration is problematic. Whilst it is commonly used in the literature, there are relatively few attempts to provide a clear definition. It is considered by some to be a value-laden and normative concept, implying the existence of a monocultural society with a common set of norms and values, where the incomers are expected to adapt to the

existing or mainstream culture and society, without any reciprocal adaptation (Rudiger & Spencer, 2003). However, this begs the question of what kind of society it is that migrants are being integrated into – is it a monocultural or a multicultural society? Is the incomer expected to subordinate or abandon their cultural identity in order to be assimilated into the mainstream, or is the society one in which a variety of communities and identities co-exist and are accorded equal rights? Viewed through this lens, criticisms of the term integration appear valid when applied to monocultural societies with low experience or tolerance of diversity, and which operate discriminatory access to political and legal rights, but less applicable to multicultural countries with a wide range of diverse ethnic and religious communities. It would therefore appear axiomatic to conclude that integration should not be measured against a single, monolithic standard, but needs to recognise the existence within society of various distinct and overlapping social groups which shape individuals' identities, values and priorities (Woodcock, 1998).

However, how are the relevant indicators of integration to be identified and measured, and how can the need to recognise the heterogeneity of entrants, and the significance of the background and experiences that they bring with them, be accommodated? Nee and Sanders (2001) propose a "forms of capital" model for understanding the factors that influence the integration of migrants. This approach is significant because it overcomes the tendency to exaggerate the role of host country policy and practice, recognising also the significance of the social, financial and human capital of entrant families and how these interact with ethnic networks and institutions to create a "constellation" of favourable and unfavourable factors that determine the integration trajectory. However, the tendency of existing research to over-homogenise migrants and refugees means that there is little empirical evidence on which the factors identified by Nee and Sanders can be explored in depth to take account of diverse backgrounds and characteristics. This is a general point, but also applies specifically to migrants and refugees' access to, and experience of, education and training for which there is, in most countries, a lack of comprehensive and detailed data.

As integration has fallen out of favour for its alleged negative connotations, alternative terms, particularly inclusion and participation are commonly used in preference: "Inclusion refers to how immigrants and refugees have access to, use, participate in, benefit from and feel a sense of belonging to a given area of society" (Castles et al., 2002, p. 115). For inclusion to be successful, a two-way process is required, but the extent to which a society is willing to actively embrace integration is difficult to gauge as public attitudes and perceptions are volatile, difficult to measure and strongly influenced by the method of measurement (Rudiger & Spencer, 2003). Nevertheless, it would appear fundamentally important that the host society should provide a legal, political and social environment that makes the incomer feel welcome and respected through, for example, the existence of anti-discrimination legislation and fair and transparent opportunities to apply for citizenship. Integration policies generally assign a key role to language acquisition, education and training, not only to facilitate transition into the labour market, but also to develop cultural understanding between the host and migrant communities.

However, it must be borne in mind that, whilst education and training is a crucial site in the integration process, there are others such as housing and health, and there is a danger in ascribing too much responsibility to the role of education and training. Indeed, as Rudiger and Spencer wryly observe: "policymakers tend to resort to education initiatives when progress in other spheres, particularly employment, seems beyond their control" (2003, p. 28).

3.6 The Children of Migrants and Refugees

The availability of reliable country data relating to the educational experience and outcomes of migrant and refugee children is limited, and the opportunities to make meaningful international comparisons even more so. Nevertheless, a number of large-scale national and international studies provide some relevant data, the most comprehensive of which is the latest Programme for International Student Assessment (PISA) (OECD, 2003). Using standardised tests conducted among a representative sample of 15 year-olds in 37 countries, PISA gathers information about the relative performance in the three domains of reading, mathematical and scientific literacy. The age at which students are tested is significant, as it is the age at which students in most countries are approaching the end of their compulsory schooling. For this reason, PISA also seeks to gather information about students' attitudes towards learning, as a predictor of the extent to which they are predisposed to become "lifelong learners". Whilst PISA cannot claim to be conceptually and methodologically flawless, it nevertheless provides a rich source of comprehensive, multicultural data from the OECD and other participating countries including Peru, Brazil, Hong Kong China, the Russian Federation, Thailand and Indonesia.

Recognising the growth in migration in many participating countries, particularly the relatively rich OECD member States, the latest PISA study, conducted in 2000, analyses data according to three categories of student. The first is *native* students who were born in the country where the assessment took place and had at least one parent born in that country, and the second is *first-generation* students who were born in the country where the assessment took place, but whose parents were born in another country. The third and final category is *non-native* students, i.e. those who were born in another country and whose parents were also born abroad (ibid). The PISA data do not indicate the length of residence of non-native students, and it is acknowledged that many of these students will not have many years of experience of the educational system of the country in which they were tested, and the language of the tests will have been a second language. Nevertheless, it is argued, the first generation and non-native students will still be expected to have the same levels of knowledge and skill as native students when they reach the end of their formal schooling and seek further study or employment. This is a valid point, important to strategies for the promotion of equity and social inclusion: children who are performing less well in school are more likely to leave at the earliest opportunity, and are in danger of becoming excluded from the labour market or

trapped in low-skill, low-income occupations. There are of course dangers in focusing narrowly upon educational achievement, as other aspects of the educational experience are also significant to social inclusion, but the educational attainment of the children of migrants and refugees is nevertheless important in gauging their likelihood of experiencing social exclusion after leaving school.

In 13 participating countries, at least 3% of the students assessed were non-native or first-generation. In 9 of the 13, there were large and statistically significant differences between first-generation and native students across all three domains. In reading literacy, these represented a full proficiency level in Germany, Luxembourg, the Netherlands and Belgium. As might be expected, non-native students generally fared even worse, except in New Zealand where first-generation and non-native students were comparable. Again, it is not surprising that students who spoke the language of assessment at home (majority-language students) performed better in PISA than those who spoke other languages at home. Exceptionally, however, Australia and Canada demonstrated no significant difference in reading, mathematical or scientific literacy between the three categories of student, and across all three domains. This is particularly striking in view of the fact that both countries have large migrant populations: 11% of all Australian students are first-generation, and a further 12% are non-native. The factors contributing to this strong performance by the children of migrants and refugees in Canada and Australia clearly merits in-depth exploration through comprehensive and detailed comparative research.

PISA does not gather information about the specific nationality or ethnic group of non-native and first-generation children, but a number of other international studies provide insights into how ethnicity appears to interact with socio-economic background and length of residence in affecting educational performance. Evidence from the United States, Australia, Germany and France appears to confirm the importance of parents' socio-economic status and length of residence in the country as important factors influencing children's educational outcomes. However, the significance of ethnic community also emerges as a consistent feature. A United States study comparing the academic performance of the children of (relatively advantaged) Cuban and Vietnamese migrants with the children of (relatively disadvantaged) Haitian and Mexican migrants found that parents' socioeconomic status and length of residence in the United States significantly affected the students' academic performance as measured with standardised tests in mathematics and reading, but did not eliminate the effects of ethnic community (Portes & MacLeod, 1996). However, evidence on the relative significance of ethnicity is mixed. A German study found that, relative to young Germans with identical socio-demographic characteristics, Italian, Turkish and Yugoslav children are performing less well, whilst Greek children were, in some respects, outperforming the German children (Alba et al., 1994). Meanwhile, the children of migrants and refugees are under-represented in the types of schools which lead to higher qualifications: most continue their schooling in the secondary modern school (Hauptschule) and are disproportionately represented in special schools for children with learning difficulties (Behrens et al., 2002). It may be the case that the hierarchical organisation of the German school system is a factor

contributing to the relative disadvantage of the non German-born. Children are streamed at the end of elementary school and, as evidence from France would suggest, this may be too early to allow them to demonstrate their potential.

Vallet and Caille's (1999) analysis of the French National Education Longitudinal Study, a panel study of over 22,000 pupils who entered lower secondary school at about the age of 11 in September 1989, found that migrants' children initially performed less well than their schoolmates in standardized tests, but after 7 or more years in secondary school, had more success in the baccalaureat examination than native children with the same social background and family environment. The same study also gathered data about migrant parents' educational aspirations for their children and found that these were stronger than for comparable native families with similar socio-demographic characteristics. This raises the issue of the role which migrants and refugees themselves ascribe to education as a vehicle for advancement in the host society, and the extent which these aspirations influence educational outcomes. Vallet and Caille state that, compared to other pupils, "the children of migrants are more persevering in the direction of success when they face school difficulties". Persistence and the resilience to overcome obstacles is a key aspect of empowerment, as defined earlier. The aspirations and support of parents is clearly important, but so too is the extent to which the school offers an enabling environment, including the provision of specialist curricula and staff training to enhance capacity to support migrants and refugees. A substantial proportion of migrants and refugees have to adjust to education systems which are very different to those in the country of origin. For example, European, north American and Australian systems are likely to more "active" and "student-centred" than those previously experienced by migrants and refugees from Asia and Africa. Adjusting to the different expectations, styles and methods of teaching and learning can therefore present difficulties to which teachers need to be sensitive. The transition is likely to be smoother if teaching staff have some knowledge and understanding of the different traditions from which the students come, and this again raises issues of staff training and staff development in a multi-cultural teaching environment.

Children's experiences of bullying, racism and xenophobia will obviously impact upon their physical and mental well-being, and school policies to deal with such incidents will send out powerful messages about the extent to which the school is serious about inclusion. The PISA index of *sense of belonging* was based on students' responses to statements including the extent to which they felt like an outsider, felt like they belonged, felt awkward and out of place, and lonely. The final report presents this information by country, but is not analysed by the categories of *native, first generation* or *non-native* adopted elsewhere in the study. Nevertheless, the data exists and its analysis could provide important further insights into the factors affecting the complex state of *sense of belonging,* and how these particularly impact upon migrants and refugees. Again, there may be variations between children from different cultural, class and educational backgrounds that could be of relevance in shaping appropriate, targeted policy responses.

Whilst undoubtedly important for the reasons stated above, reaching the end of compulsory schooling does not represent a once-and-for-all point at which

educational opportunities cease to exist. Even students who leave school at the earliest opportunity can return to tertiary education immediately or at some point in the future. In particular, the children of more recent migrants might reasonably be expected to take longer to adjust to the educational system and realise their potential. For these students, as well as for adult migrants and refugees, the ability to access, and their experience of, post-compulsory education may be a crucial factor, and is considered next.

3.7 Adult Migrants and Refugees

Internationally, the role of children's education in promoting the social inclusion of migrants and refugees is widely acknowledged and increasingly researched. Similarly, access by adults to education and training opportunities is internationally acknowledged as significant, but there is no comparable evidence base on which the experience of migrant and refugee adults can be analysed. As stated earlier, national laws governing citizenship and rights of residence will largely determine the entitlement of migrant and refugee adults to education and training. Countries with co-ordinated resettlement policies generally provide advice and guidance on access to education and training, and language learning support, as part of the package (Ndofor-Tah et al., 2003). Various international studies have concluded that command of the language is the single most significant factor affecting settlement and integration in general, and access to education, training and the labour market in particular (Schellekens, 2001; European Council on Refugees and Exiles, 2000; Iredale et al., 1996). Language proficiency is a key indicator of integration adopted in Canada and Australia, countries in which longitudinal databases systematically gather information from representative samples of migrants and refugees to gauge perceptions of, and experience in, the host country. (Ndofor-Tah et al., 2003). It is self-evident that the degree of proficiency in the host language will affect inclusion by impacting upon access to education, training and the labour market, but language proficiency is also likely to affect people's sense of "belonging". A UK study of refugees found that nearly three-quarters (74%) of those who spoke English fluently saw "Britain as home", compared to 57% who did not speak any English. Those who reported that they did not see "Britain as home" were disproportionately female and unable to speak English (Bloch, 2002). This highlights the need to take into account the specific needs of migrant and refugee women in facilitating access to language training, and single sex language classes and the provision of childcare has become increasingly common.

Formal resettlement programmes can play a vital role in facilitating access to education and training for adults, but policy and practice at the level of the educational authorities and individual institutions are also significant. Migrants and refugees can face enormous problems in having their skills and qualifications recognised (Iredale et al., 1996; Bloch, 2002). A 1996 Australian government report on migrant access and equity acknowledges the discriminatory nature of the skills

recognition system "at least in outcomes" to the detriment of those "not trained in a system developed from the British model" (House of Representatives Standing Committee on Community Affairs, 1996, p. 53). Consequently, large numbers of migrants and refugees cannot practise their skill or profession, nor have their qualifications recognised, without further study. Depending upon the nature of the qualification, they are likely to have to re-take courses, sometimes from the beginning. In many cases, refugees have been unable to carry official documents confirming educational experience and qualifications with them when they fled, and it is politically impossible to obtain copies. In her study of refugees' experience in the UK, Bloch found that 16% of respondents did not have their certificates with them (Bloch, 2002). This creates problems when applying for courses which demand previous qualifications, and the quality of advice, information and guidance available will be important in identifying the options available. Once migrants and refugees embark upon education or training, the degree of sensitivity and support encountered will have a major impact in determining whether the course of study is successfully completed.

The language, literacy and numeracy skills which adult migrants, refugees and asylum seekers will perceive themselves to have will be also be influenced by other factors including social class, level of literacy in the mother tongue, previous education and occupational background and economic and social aspirations whilst in the host country. This highlights the need for appropriate initial diagnostic assessment of language, literacy and numeracy needs, and the flexibility for provision to adapt to individual circumstances. Often, it is to the various voluntary and non-governmental bodies that provide advice and guidance on welfare issues in general that migrants and refugees turn when they first seek advice about access to education and training. In Australia, the network of Migrant Resource Centres (MRCs) employs Specialist Migrant Placement Officers (SMPOs) with a specific remit to help clients to access employment, education and training. However, it is difficult for them to maintain the up-to-date specialist knowledge necessary to fully advise clients about opportunities in the broad and complex field of post-compulsory education and training. Staff from the MRCs, and others based in ethno-specific refugee projects, have reported that they believe migrants and refugees to be disadvantaged by the absence of an appropriate source of information and guidance that is general, impartial and sensitive to their circumstances and needs. (Hannah, 1999). A number of initiatives have been launched in the UK to address this need. These include the Refugee Education, Training, and Advice Service (RETAS) and the Refugee Education Unit, both of which are based in London. RETAS services include individual advice and guidance and training courses in various aspects of seeking and preparing for employment in the UK (World University Service, 1997, p. 3).

The factors influencing the selection of a course of study will vary according to individual circumstances and aspirations, but appropriate advice and guidance should also take account of whether the individual expects and hopes to settle permanently in the host country, move elsewhere or move back to the country of origin (McDonald, 1996). Unsurprisingly, refugees interviewed by the author in Scotland in 2002 reported a mixture of aspirations: some expected to settle in the UK and therefore

needed to develop skills appropriate to the UK labour market. Others hoped to return to their country of origin when circumstances allowed, and therefore wanted to use their time in the UK to develop skills that would be of use upon return. However, if two labour markets are very different in nature, the selection of useful and appropriate skills development opportunities is a particular challenge, and the host country provision may not be relevant to the circumstances of the country of origin.

Education and training projects provided specifically for, or targeted at migrants and refugees are likely to demonstrate sensitivity to individual circumstances and needs, but this is more of a challenge for mainstream providers. Instead, access to support services such as counselling, study skills or language support is likely to be assessed on the same basis as that applied to any other student. This position may arise from a genuine desire not to separate out or stigmatise those from migrant and refugee backgrounds, but it results in an absence of any acknowledgement of the specific problems that such students may face. In the words of one Bosnian refugee living in Sydney, "treating everyone the same can be discriminatory (Hannah, 1999, p. 163). For example, whilst it is true that some problems such as panic attacks and difficulty with concentrating might affect non-refugee students, the probability of their occurring in students from refugee backgrounds is higher.

If institutions were at least officially aware of the fact that a student had a refugee background, they could, with the agreement of the student, alert the teachers and trainers to be sensitive to this. Entitlement to sensitive pastoral and learning support may also prove crucial. A counsellor employed by one of Sydney's universities reported that she "regularly" counselled students from migrant and refugee backgrounds. By the time she saw them, however, their problems were often quite serious. Occasionally, and with the students' permission, she would act as an intermediary between the student and tutor, renegotiating deadlines or agreeing other appropriate forms of action. She was surprised at how often key personnel from the student's department were unaware that the student had a refugee background. Generally, they were sympathetic to her suggestions when informed. Not often, but nevertheless disturbingly, she also encountered tutors who argued that it was "unfair" to make concessions as this discriminated against "Australian" students (Hannah, 1999). These examples highlight the importance of staff awareness, attitudes and behaviour, but staff training in relation to these issues is rarely made compulsory by the mainstream education providers in Australia and the UK. In view of the increasingly multi-cultural background of trainees and students, it would seem appropriate for providers to take more seriously the need to address the awareness, attitudes and behaviour of their staff.

3.8 Conclusion

Migratory movements are likely to remain at high levels for the foreseeable future, and the formulation of policy to promote the inclusion of migrants and refugees continues apace in the major destination countries. Education represents a key site

for both the promotion of empowerment and inclusion, and the measurement of its achievement, as its incorporation into the OECD PISA study demonstrates. International evidence of this kind provides some interesting insights into how the performance of the children of migrants and refugees compares with native children, and the impressive performance of Canada and Australia in particular merits further exploration and comparative analysis. However, with their emphasis on performance in tests, such studies cannot capture the various other ways in which education contributes to a child's well-being and inclusion, and more detailed data is required to facilitate greater understanding of how the various cultural and socio-economic factors interact to determine the integration trajectory. Similarly, lifelong learning is recognised as an important weapon in the battle against social exclusion, and education and training can also play a central role in facilitating the empowerment and inclusion of adult refugees and migrants. In international law, adults do not have the same rights as children to access education, and circumstances will therefore vary between countries. Nevertheless, appropriate advice, information and guidance and institutional sensitivity and support will always be important to ensuring that individual circumstances and needs are catered for to maximise the benefits of education and training. As with children, there is a need for more detailed information about the backgrounds and experiences of migrants and refugees to facilitate greater understanding of how cultural and socio-economic factors interact to determine the integration trajectory.

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Chapter 4
Equity and Democratic Education in Ghana: Towards a Pedagogy of Difference

George J. Sefa Dei and Riyad Shahjahan

4.1 Introduction

This chapter examines equity and democratic education in Ghana, focussing on the practice and pedagogy of [social] difference. It is based on the findings of a longitudinal study in selected Ghanaian schools, colleges and universities, in which students, educators, school administrators and policy officials in the local Ministry of education reflect on how their schools deal with ethnic, gender, class, religious, linguistic, [dis]ability and cultural differences among the school population. This chapter utilizes a critical anti-colonial discursive framework to theorize the nature and extent of on-going colonial relations in schools drawing on the implications for knowledge production, subject identity formation and the pursuit of agency for resistance. It is argued that a critical anti-colonial prism to understanding schooling practices offers possibilities for charting the course/path of educational change. It is also contended that in order to create a truly democratic society we must see inclusion and inclusiveness as paramount.

Equity is about social justice and treating people fairly in deep recognition of the differences in power and relations of power that exist in society (Dei et al., 2006; Zajda et al., 2006). The struggle for equity entails working to address such social imbalances informed by an ideology supporting the notion that those privileged have the burden to work towards a redistribution of social power. Such power is material, discursive, ideological and symbolic. In this discussion of equity and democratic education we bring an understanding to 'equity' that affirms the physical, material, emotional, social and spiritual well being of both the self and the collective. The affirmation arises from a recognition of each other's fundamental freedoms and rights to the valued goods and services of society, while at the same time fulfilling the accompanying responsibilities. Sound equity practice requires that we note differentials in our advantages and disadvantages at the systemic and institutional levels. It also means that we point to the practices that reproduce privilege and dominance for some while punishing and disadvantaging others. The

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affirmation of our self worth and collective existence, rights to the valued social goods of society, and the accompanying responsibilities in themselves is an exercise in true democracy. We maintain that democratic education is reflected in a school system that is able to address the questions of power, identity, difference, rights and responsibilities in its politics of citizenry (see also Apple, 1993; Giroux, 1992; Mclaren, 1995; Portelli & Solomon, 2001; Zajda, 2005).

In choosing to address the topic of equity and democratic education in Ghana, we hope to bring a generosity of spirit and openness to debates around pedagogies of difference. Our learning objective is to join in a thoughtful dialogue on equity and inclusive practices in Ghanaian schools that focus on the practice and pedagogy of [social] difference – ethnic, gender, class, linguistic, religious, ability differences. It is our contention that to create a truly democratic society we must see inclusion and inclusiveness as paramount. Examining and responding to these issues cannot fall into tokenism. Difference must be acknowledged and responded to firmly to ensure equity, fairness and respect for every learner. We see this goal to be the challenge of 'post-colonial' education in Africa. The 'school' is a community of individuals learning and sharing together. All students, teachers and administrators belong to the school community and therefore, we should value the differences embodied in various stakeholders as sources of our collective strength. Schooling is not simply about receiving knowledge and/or providing the learner with the requisite skills and 'tools' to function fully in society. It is also about enhancing the emotional, physical, psychological and spiritual well-being of the learner and teacher. Many times educators may not even be aware of how exactly privilege works in society and schooling. We observe this in the prevalent refrain of many educators and their rhetoric that 'we are all Ghanaians' when charged to account for difference in schooling. But, the visual culture and the physical landscape of the school setting may privilege the majority culture and hinder the creation of a community feeling that all educators may wish to foster. Often the majority cultures, dominant gender, ethnicities, linguistic, able bodied and religious groups and their viewpoints can oppress without educators, students and school administrators even becoming aware that they are doing so.

Addressing equity and enhancing democratic education requires that we do not underestimate the subtle tyranny of the majority and the cumulative force of the majority/dominant claim to attention. Dominant ethnic, linguistic, religious, able bodied, socio-economic class groups can claim to be 'unconscious' or unaware of their own privilege. Why such groups can remain oblivious to their privilege is because quite often their identities, histories and cultures are never questioned or challenged by anyone (Freire, 1998). Ghanaian schools can promote greater equity if educators, students, administrators and communities rethink their views of what is normal, neutral and 'Ghanaian' in terms of the ways exclusions and inclusions play out and how dominant identities are imposed upon others.

In discourses about the nationhood, differences can be subsumed in the accentuation of sameness and commonality of values (Loomba, 1998). When this happens the goals of nation building and the politics of nationalism can be imperialistic, at

least in spirit. We cannot afford the exclusion of any segments of the population in terms of people's experiences, knowledges, traditions, cultures and histories in the making of the 'nation' or 'community'. Our understanding of the 'normal' must be broad enough to account for difference. We must acknowledge and respond to such difference. No one can be excluded nor made to feel marginal.

Education has an important role to play as an overriding task of promoting equity and democratic citizenship participation (Portelli & Solomon, 2001; hooks, 2003). It is unhealthy to have an educational system in which the values of the majority are subjugated by the values of the minority and vice versa. In all its activities associated with the delivery of education, the school (taken broadly to include college and university) should represent the entire population that constitutes its body politic. The objective of a truly democratic society requires that we work collectively to remove any barriers to genuine equity and inclusiveness. Cultural symbols and other acts of symbolism are not harmless nor culturally neutral. We must celebrate as much as we can our diversity and difference, and also find ways to respond to the challenge of difference.

In this paper, we examine narratives of Ghanaian students about their schooling experiences in order to understand the possibilities of creating a truly democratic school system and society. It is our contention that certain questions are central to a discussion of difference and diversity and their effects on any school system. For example, how do Ghanaian educators ensure that schools respond to the needs and concerns of a diverse student body? How do educators assist ethnic, religious, linguistic, disabled minorities, as well as, women and students from low socio-economic family backgrounds to develop a complete sense of belonging to their schools? How do schools ensure that 'excellence' is not simply accessible but is also 'equitable'? And, what do learners and educators see as the role of education in helping to build a socially cohesive society? To underscore the importance of these questions in discussion of equity and democratic education in Ghana, we have to critically examine the possibilities and limits of 'post-colonial' education.

4.2 Theorizing 'Post-Colonial' Education

As remarked earlier, 'post-colonial' African education has conceded questions of difference to the background in the zeal to promote national unity, common citizenship and bonds of nationhood. The political project is to proclaim our similarities and put differences onto the backburner for fear that such differences could conjure tensions, unease, ambiguities and contradictions. While not underestimating the significance of our shared commonalities, it is equally important that we differentiate 'unity in sameness' from 'unity in difference' (see Dei, 2004a, b). This paper employs a critical anti-colonial discursive framework to theorize the nature and extent of on-going colonial relations in schools, and the implications for knowledge production, subject identity formation and

the pursuit of agency for resistance. A critical anti-colonial prism to understanding schooling practices offers possibilities for charting the course/path of educational change.

The 'colonial' is read not simply as 'foreign and alien', but is taken broadly to mean anything that is 'imposed' and 'dominating' (see also Memmi, 1965; Fanon, 1967; and Foucault, 1980). Thus, a critical anti-colonial framework will critique the dominance and imposition of ideas and practices that end up subjugating ethnic, class, linguistic, religious, sexual, disabled and cultural minorities, as well as women in society. Today colonial and recolonizing projects manifest themselves in variegated and complex ways. For example, within schools we see that different forms of knowledge get produced and receive validation, while particular experiences of some students get counted as [in]valid. Furthermore, certain identities receive recognition and response from school authorities. By examining the power dynamics implicit in the evocation of culture, histories, knowledges and experiences of the different bodies represented in the school system, we see how colonial [and imperial] relations can be masked under the nation building project of 'community' and 'common citizenship' or 'unity in sameness'.

The construction of sameness even under the experience of difference has serious consequences for knowledge production. The material reality of colonial relations of schooling is that the marginalised may fail to problematize their marginalization, let alone critique the status quo in the bid to reinforce the social goods and values of education. Anti-colonial discursive framework uncovers and emphasizes how colonizing practices are continually reproduced and deeply embedded in everyday relations of schooling, and how local cultural knowledge become powerful sources of knowledge allowing for daily resistance to subvert all forms of dominance (see also Smith, 1999). Consequently, the normative claims of shared identity inherent in discourse of nation building must be interrogated to unravel how certain hegemonic interests can be served when differences are erased (see Cesaire, 1972). This is not a politics to cast away 'community'. Rather, it is a call to assert our 'communities of differences'.

It is important to examine how colonial relations are altered around ethnicity, gender, class, age, disability, language, culture and religion as sites of difference (Dei & Asgharzadeh, 2001). Schooling practices that reinforce exclusive notions of belonging, difference and superiority can only be considered as colonising. Conventional processes of schooling that embrace a politics of domination and further construct dominant images of students from particular ethnic, gender, religious, cultural, linguistic and socio-economic groups as the norm can be subverted by an approach to schooling that values difference. Developing an anti-colonial lens helps challenge the relations of schooling that sustain hierarchies and systems of power.

Colonial constructions and relations in schooling also influence knowledge production with profound material consequences for different bodies in the educational system. In order to dismantle dominant relations of schooling, educators need to operate with difference and address the marginality and misrepresentations of

ethnic, gender, class, linguistic, disabled and religious minorities' knowledges and experiences. Through the mutually constitutive relations of power, certain knowledges and experiences are claimed as more valid and worthy of discussion than others. But all knowledges and experiences must be validated through critical interrogations of history and the lived experience. For ethnic, class, gender, linguistic and religious minorities, the 'two-sidedness' (Howard, 2004) of colonial relations suggests that we (as educators) look at both the privileged and the subordinate positions. This is because rupturing colonial relations and practices of schooling has as much to do with studying dominance as well as a study of the marginalized positions of resistance. Part of the knowledges of the marginalised is about every day resistance and the power of a subject's intellectual agency to influence the course of history. Today difference may be irrelevant to some, but all is about difference (Giroux, 1992). Collectively we must find ways to acknowledge, discuss and respond to difference and do so in a way that shows the interconnections of our histories and identities. This is the challenge of 'post-colonial' education.

Therefore, in discussing the possibilities of educational change in Ghana we must first understand the power of discursive interruptions to conventional practices of schooling that fail to account for difference in relation to ethnicity, gender, class, religion, language, disability and culture. We need critical discursive shifts that highlight the problematics of the nation building discourses that sweep differences under the carpet. To know the nature and extent of colonial/colonized discourses and practices at school we must interrogate the voices of local subjects who are differently positioned as they speak about their schooling experiences. For example, how do local subject voices problematize or reflect upon social difference? This will be a key question explored in the subjects' narratives of this paper.

4.3 Study Methodology

The paper is based on a longitudinal field research conducted in Ghana and Canada extending from 2000 to 2003. The study was funded by the Social Sciences and Humanities Research Council of Canada (SSHRC) with one of the authors, George Dei, as Principal Investigator (PI). The study has relied on the assistance of a number of graduate students at the Ontario Institute for Studies in Education of the University of Toronto (OISE/UT) and undergraduate student researchers in Ghana. Some of the OISE/UT assistants travelled with the PI to Ghana during the course of the study. There were three main research phases, each phase comprising of field research in Ghana and a Canadian component. In Phase One (2000–2001) a total of sixty-two (62) individual interviews were conducted with Ghanaian-born educators now residing in Canada (some of whom currently work as school and college teachers and social workers), as well as local educationists at the Ghana Ministry of Education and Ghana Education Service, college teachers at two Senior secondary

Schools (SSS),[1] as well as prominent Ghanaian educators noted for their contributions to the field of education. In addition, ten (10) international students studying at the University of Ghana, Legon, were interviewed.

In Phase Two (2001–2002) a total of sixty-six (66) individual in-depth interviews and focus group discussions were conducted. The study participants included Ghanaian-born students now living and attending Canadian universities, Ghanaian students attending local universities, university lecturers in Ghanaian institutions, as well as focus group discussions with the university students. The interviews were supplemented with ethnographic observations of summer classes held at university campuses.

In the third and final phase of field research activity (2002–2003), a total of thirty-five (35) individual in-depth interviews and focus group discussions were held focussing on the junior and senior secondary school (JSS and SSS) as well as university college levels in Ghana. In addition, five (5) Ghanaian-born high school students in Canada were interviewed. We also conducted focus discussions with the JSS students College/SSS students and university students.

Throughout the study, the selection of interview participants reflected differences in ethnic, cultural, linguistic, religious, gender, and class backgrounds. In some schools and colleges study participants were obtained through contact with school officials and classroom teachers. At one local university, the Dean of Students was particularly helpful in locating students, educators and administrators for the study. Most of the students interviewed on university campuses were taking summer classes (sandwich programs). In other cases, university students vacationing in their hometowns and communities were contacted for interviews. In each case, study participants were asked to speak about their backgrounds and schooling experiences and how questions of ethnicity, class, gender, language and religious differences implicated their schooling. Study participants were also asked to identify school support systems and resources needed to effect inclusive schooling in local contexts. Students, teachers and school administrators were questioned about their views on inclusion in education and the extent to which schools addressed concerns of students from ethnic, cultural, gender, class, religious, (dis)ability and linguistic minority backgrounds. We also ensured that our sample population for interviews included minority students themselves drawn from all regions of the country.

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[1] In 1980 Ghana undertook a series of educational reforms under the auspices of the World Bank/IMF inspired educational sector adjustment of the Structural Adjustment programs. These reforms brought structural changes to the delivery of education in Ghana. For example, the secondary program now includes a 3-year junior secondary school education (JSS), followed by another 3 years of senior secondary education (SSS). Graduates of the SSS can then apply for admission into the tertiary cycle, either in university, polytechnic or teacher-training programs.

4.4 Subject Narratives

4.4.1 Ethnicity

In schools we have different bodies bringing a diversity of experiences embedded in histories, cultural knowledge and unique ancestral experiences. Knowledge production is a collective endeavour, which implies that all bodies contribute to the making of knowledge (Semali & Kincheloe, 1999). Such knowledge is shared among peoples. Therefore, it is necessary that schools and educators address the diverse and converging interests of the various groups and cultures. However, in 'post-colonial' Ghana, the nationalistic discourse dominates to cover up any ethnic differences, and in turn, emphasizes homogeneity of the population. This perspective was quite prevalent among some of our participants. Dabenaa is a female university student at the University of Science and Technology. She is Catholic and belongs to the dominant Ashanti group. She explains why we should emphasize the sameness of Ghanaians and not look at issues in terms of ethnicity:

> It think it is time that Ghanaians started looking at themselves as Ghanaians and stop grouping us into these ethnic groups and tribes because that is where we can really live together. But if I meet somebody and I ask, 'where do you come from', this way I make the person very uncomfortable. They start avoiding you. I think we should look at each other as Ghanaians, in one social group, having the same problems and the same issues. (File 01-GUS-09: Text units 169–175)

Dabenaa posits that we should go beyond categories of differences (in this case ethnicity), so we can live at peace with each other. She supports her stance by arguing that the topic of interrogating one's place of origin, similar to one' ethnicity, evokes undesirable tensions, discomfort and ultimately leads to people 'avoiding' each other. According to her, Ghanaians need to view themselves as one body and maintain their unity by keeping their gaze on common 'problems and 'issues'. Through Debenaa's eyes, as educators we would not see the importance of ethnicity, or other lines of difference, as sites of constructive efforts and hence we should ignore it in schooling. Dabenaa's stance that we simply focus on our commonalities can be difficult knowledge for the minoritized as we have ethnic minorities continually subjected to differential treatment. The problem is not their ethnicity per se but rather the interpretation that is put on their ethnicities which are embedded in sociohistorical power relations. While commonalities as Ghanaians cannot be discounted, neither should the differences that make the collective. We can talk about ethnicity in more empowering ways that will let people feel proud of their collective identities. For instance, Mansa, a female member of the Akan culture, highlights the importance of acknowledging difference and seeing it as a strength in terms of ethnicity:

> For you to have an appreciation of the other ethnic group or other ethnic groups in the country you have to [have] experience with somebody from that ethnic group and if you don't get to have them in school and knowing that schooling is a very important carrier of cultural norms and practices. So they come there and you see what they are doing and you

> begin to question your own ideas of superiority and inferiority and where you think these fit. (File 01-GCS-08: Text units 490–496)

Mansa, a graduate of Canada and who is currently teaching in the US, highlights the knowledge sharing process by acknowledging ethnicity as a line of difference. Some students may develop a false sense of superiority vis-à-vis their ethnicity and use it as a mode of exclusion. Mansa wishes to combat this by using ethnic differences as a site for critical learning moments where people's stereotypes and sense of superiority over others are interrogated. She argues that ethnic differences should not only become a focal point of a critical reflection, but a site where one can appreciate their own cultural values and norms. Knowledge production is a dynamic process and when differences are acknowledged and incorporated, not only does that lead to empowerment of minoritized learners, but leads to the appreciation of the different forms of wisdom and experiences that different bodies bring to the classroom. Through this form of critical pedagogy, learners can redistribute power relations and understand that all learners have valid embodied experiences, values and worldviews that help us name and act in this world. Through these narratives, educators can appreciate how different bodies bring different interpretations of difference. While Dabenaa condones difference, Mansa has an opposite point of view, and this is an important lesson for educators to take. It highlights the importance of listening to different voices to get a tapestry of insight towards social differences and its importance in schooling.

4.4.2 Class

As we note elsewhere (Dei et al., 2004a), socioeconomic classes represent a marker of difference and diversity that affect individuals' sense of self, worldviews, living environment, and life expectancy. Ghanaian subjects' narratives offer insights into class issues specifically faced by students. They also examine the general definitions, understandings and implications of 'class' as one of the key sources of social differentiations. Rowena is a female student of the dominant Akan (specifically Asante) background. She is currently a doctoral student in Canada. She reflects on her schooling experience back in Ghana:

> I for instance went to a school where we seemed to all come from the middle class so it was quite difficult to see the disparity between the two. In fact it is a very serious issue where some people had to go to school without shoes, pencils and some did not have school houses and so had to study outside because there was no school building. I think it becomes a very big issue where some people have to study under such conditions. It makes it very difficult to for them to achieve their purposes in life. (File 01-GCS-04: Text units: 101–108)

Rowena is asking us the following question: How is a child or student meant to learn when one has to worry what to wear, the physical space they are studying in, the availability of reading and writing material and so on? Rowena indicates how one experiences and navigates through the schooling system and what conditions

they have in their schooling are determined by their class. As seen in her narrative, Rowena was not aware of class issues in her schooling experience, as she went to a school where most students came from middle class backgrounds. She problematizes her middle class privilege, as she compares her schooling experience to those who did not come from privileged economic backgrounds. Here, the question of consciousness of class issues is raised. One's class and what kind of conditions one is surrounded with determines whether or not they are aware and experience visible/embodied class issues in schooling. She posits that students who came from lower economic backgrounds did not have the same access to opportunities and resources in their schooling experience. She further argues, not having such access, jeopardizes not only their schooling experience but also drastically affects their aspirations and goals in life, as they experience first hand the struggles of access to opportunities early in life. For educators, this narrative is a clear indication of how important it is to address issues of class for inclusive schooling.

One has to interrogate why some students have access to certain educational opportunities and resources while others do not. What are the social conditions surrounding a learner's life that marks and determines their schooling? How do we address these social conditions? How does class based and other forms of inequality operate in society and Ghanaian schooling? Rowena asks educators to look beyond the homogeneity of populations and recognize there are differences and class is a line of difference that operates in Ghanaian schooling. Sometimes, the issue of class is not just about access to resources but it is also about having access to the cultural capital that permeates the schooling system. One needs to fit a certain norm and if one does not fit in it then one is 'othered' through stereotyping and other forms of discrimination.

These issues are raised in the following narrative. Samara considers himself an ethnic minority who comes from a small village called Navrongo in the Northern region of Ghana. He interrogates how class inequalities operate in schooling and how this intersects with issues of ethnicity.

> Sometimes you just look at that especially the riches come from around and the poor come from far away. The slightest expression is "you people of this place" casting us a form of insinuation. … The rich come from the very nearby background and the culture is almost similar. You do not come from the place, so sometimes when you come here nobody takes you to the culture here. I have not learned it before. Nobody take you through, and no one orients you to the culture around. Sometimes you do things that you used to do somewhere else. So they look at you and tell you that you are not from this place. (File 02-GUS-01: Text units 229–239)

In this narrative, Samara eloquently points out that there is no neutral culture in schooling and that this culture is a mirror of the dominant group. He argues that, in his university, the schooling culture represents those bodies that come from the surrounding region, who also happen to constitute the dominant class. Hence, he is interconnecting ethnicity with the question of class. Samara, an ethnic minority, interrogates the dominant culture of schooling by pointing out how alienated he feels as he navigates through the university. If one does not fit in the norm of the dominant culture, then one is constructed as the 'other', not just in terms of one's

class but also their ethnicity. Samara feels discriminated against because he doesn't fit or 'belong' in the normal culture and feels as though in such a culture he requires an orientation. For educators this raises a number of questions. How is a learner meant to do well academically when one feels alienated in the schooling culture? Are such learners at the same level playing field as other students who fit in the norm and feel they belong? How do we address the interplay between class and ethnicity and other lines of difference? What kind of resources and policies do we need to put in place where "all learners" can feel as if they all 'belong'? Educators need to deal with these difficult questions to ensure that every Ghanaian student is at the center of the circle of schooling and not at the periphery. In addition, educators need to understand the different readings different bodies bring to the discussion surrounding the question of schooling and class. Educators need to make sure all the different voices are heard so that we can bring about inclusive Ghanaian schooling.

4.4.3 Language

Within Ghanaian society, over seventy living languages are spoken by different ethnic groups. As a majority language, Asante-Akan enjoys a dominant status. The majority of other (particularly non-Akan) languages are considered minority tongues which are often excluded by the mainstream media, schools and learning centers (Dei et al., 2004b). In a multilingual country like Ghana, it is a real challenge to develop a fair and equitable language policy. Moreover, this picture is further complicated, with English as the standard language of education as well as the official and national language of the nation. How do we deal with these paradoxes? In the ensuing narrative the subject examines the ways through which the Ghanaian education system tries to cope with overwhelming problems, issues and concerns emerging from linguistic plurality. As a female teacher in an Akan populated area, Owusuwaa has experienced some of these other aspects of language-based differentiation, silencing, exclusion and discrimination:

> Usually we used English as the medium of instruction…when we are teaching English but in the lower levels like say from grades one to six, we use the local language. So, if for instance the person is not from that locality, s/he is not going to be fluent in that language and that creates for her or him an inferiority complex. Even if s/he knows the answer, s/he may not want to say it because s/he will speak with an accent and others will laugh. So they are kind of shy and need to be encouraged. (File 00-GCE-06: Text units 18–26)

Owusuwaa relates an example where language is used as a mode of exclusion. She points out that when a certain local language is used in a classroom, students not having access to that language become disengaged and experience a sense of inferiority. Hence, certain languages can be disempowering for those who are not conversant in it or do not possess it as part of their mother tongue. As Owusuwaa comments, language can be used as a tool for silencing minority bodies that do not fit in with the norms of the dominant groups of schooling. In this instance, this

operates through “laughing” at those who may have an accent. This affects the learners that do not fit with the norms by negating their sense of self as they are forced to feel inferior. An inferiority complex means that, in this context, the student’s self worth and self-image are significantly amputated. Furthermore, if you are not fluent in a language, you cannot speak out in a classroom where that language is the medium of instruction; you cannot engage in discussions; you cannot add to the learning process. On the flip side, language is also a tool of empowerment and a sense of identity. So, for those students whose mother tongue is used, it is not a problem as they are not forced to express themselves in an alien tongue.

In this particular instance, Owusuwaa remedies the problem by encouraging those students who “shy” away to speak. But will this solve the problem? Will encouragement be enough to solve the linguistic issue? Will it take care of the issues of power that operate on different bodies? One needs to understand the systemic barriers that have put learners at a disadvantage from the outset.

Owusuwaa’s words point to how geography and the location of schools force some students to leave their homes and travel great distances to get schooling. This in turn not only affects their linguistic access, but also access in terms of transportation. So we can ask: Why do some students have to travel great distances to access schooling? How does one’s regionality interconnect with the issue of language and operate together in Ghanaian schooling? We need to ask these questions in order to understand how schooling inequalities operate through the lines of not only language, but also in terms of regionality and ethnicity.

For educators this is something that needs to be taken into consideration because language is a very important medium through which learners communicate and share knowledge. Language is part of one’s identity. As educators, we need to interrogate why some students are allowed to express and learn in their mother tongue, while others cannot. English may be one solution to address this issue, but English is not just a neutral language that can solve the linguistic privileges for Ghanaian students. Through colonial history, certain groups had access to English while others were underprivileged. As a result, those groups who have had earlier exposure to the colonial language will have an advantage over those students who are new to the language. So in certain schools, some educators use the local language to instruct students, but this affects those students who do not speak the local tongue.

Thema, a secondary school teacher is asked about what problems are associated with using the local language, in this case, Fante, as a medium of instruction:

> These kids understand English and there is no problem. With the Fante language, when the student is Ewe, they cannot understand Fante language. Also it is compulsory and there is no other option like Ewe, Ga and they are forced to learn the Fante language. (File 02-GJSE-06: Text units 44–48)

Thema shows the complication when one local language is used as the language of instruction other than English. Students, who are minority groups and are not conversant in Fante, while they don’t have a problem in expressing themselves in English, struggle when they have to use someone else’s local tongue. Thema’s narrative is reinforcing the same problem as Owusuwaa. They are both insinuating how the language of instruction can operate in terms of excluding students from

engaging with their learning experience as they are forced to use a foreign mother tongue. Thema raises the question of imposition of local language on certain bodies when it becomes compulsory and no other options are given. This can be disempowering for students, in this instance those who are Ewe or Ga, who have to operate in two different languages (English and Fante), both which are not their mother tongue.

This raises many questions. What impact can a lack of understanding of the language of instruction have on one's school performance, educational attainment, and overall sense of self as a student? How do we deal with this as educators? First, we need to understand that there is a difference and diversity among the student body across the line of difference of language. Once we acknowledge this diversity, we will be cautious of imposing any language as the only medium of instruction.

As educators, we need to allow for different languages to be taught and expressed in the schooling experience. Incorporating local indigenous languages as mediums of instruction allows learners to develop a sense of agency and belonging in the schooling system. Such options should be available as it ensures that students are affirmed and their identities are part of the schooling experience. Therefore, educators need to work towards an equitable language policy throughout the county and ensure that it is implemented. In this way, we can ensure that students are not left at the periphery and that their shared collective roots are part of the schooling process. This is the way that knowledge sharing can take place in an equitable way. Language is a source of empowerment as it is integral to one's identity, worldview and connection to their community. To take it away is to rupture these connections and force one to live a fragmented life.

4.4.4 Gender

Gender is central to schooling and if education is to support social development then gendered dimensions of schooling need to be examined with a critical lens. Local narratives on gender and schooling show the contesting understandings of the importance of dealing with difference in Ghanaian schooling. Asimaa is a female school teacher in a secondary school. She teaches social studies. She discusses how her legitimacy as a teacher is questioned because of her gender:

> ***Being a female teacher, how do students see you?***
> It does not come out but sometimes they see us being small and not professional.… They see us not having enough knowledge as males.
>
> ***Why do you think that happens?***
> This is because of the stereotyping of women. (File 02-GJSE-03: Text units 72–79)

Asimaa discusses students' delegitimization of her professional abilities as a female teacher by questioning her competence. Asimaa points out how the issues of professionalism and knowledge production intersects with the question of gender. Gender as a line of difference operates to render those who are female to be inferior. When

asked why this happens she raises the question of stereotypes. How does this impact Ghanaian schooling for male and female students? For male students, this kind of perception reinforces the patriarchal perceptions of women, their gender role playing traits and male superiority. In addition, it perpetuates the patriarchal power relations that structure the schooling system. How then, does this impact learning? What are the consequences of these stereotypes? In school, for female students, if these notions are not challenged, then it will become increasingly difficult for female students to truly believe that schooling is not gendered and what 'gender' means that creates problem/barriers for females. It will be difficult to convince female students that schooling is for all and that teachers who are female can teach as well as their male counterparts. Hence, educators, in order to combat this, must address the issue of gender and sexism in both schooling and society. One cannot go on without the other. In addition, educators need to recognize gender as a line of difference that operates in how teachers are marked by their students and their innate ability to teach.

To address this, educators need to not only raise awareness of gender issues and problematize such stereotypes, but they need to also interrogate the societal patriarchy and deconstruct how it operates to make students aware of how this is not just some random phenomena, but that such perceptions are embedded socially. Educators, furthermore, need to address this by providing positive role models of what women can achieve. Therefore, to do this they need to interrogate the curricula and representation of female voices in the curricula. If such measures are not taken, then females within the schooling system will continually be marginalized as they will be considered to be inferior to those who are male. In addition, female students need to see that they are empowered by providing them with positive role models to deconstruct their own subjectivities and their perception of female bodies. Fobi is a male university student hailing from the Ashanti region of Ghana. He points out why it is important to address the question of representation along the lines of gender for both males and females in Ghanaian schooling:

> It is important so that at least [regarding] this question of entries and things, we want role models. Let there be some role models, more women teaching at the university level. It encourages others to join in and that sort of balance, and you have achieved a sort of balance where everybody sees a woman as capable and a woman is also able to prove herself. Its important that we get more of the women to even change certain ideas we have of women, because at times some of them we have them because we've not actually met people who could prove us wrong. The notion that we have of women or whether it's minorities or whether it is culture, all those notions are there because you've not had the opportunities to prove ourselves wrong. So when you have more of the women it could help us even change the sort of the stereotypes the mental attitudes that we have. (File 01-GUS-23: Text units 354–367)

Fobi is arguing that with increased representation of females in school it helps to ensure that female students are affirmed by the educational system. While students can often establish some form of affinity and connectedness to their teachers, those relationships are still always framed within gendered locations. Increased female representation in teaching can only serve to motivate female students to strive harder, and as for male students, negotiating a 'new presence' for female educators

will serve to rupture their thinking about the differential competence of women and men. In addition, integrating and addressing the question of representation will help to deconstruct the common stereotypes of women prevalent in Ghanaian society and schooling. In addition, Fobi intersects the question of gender with minority construction. He sees women as a minority not just in terms of their numbers, but also in regards to how they are a minority in terms of schooling culture, and who are constantly forced to prove themselves. However, Fobi does not deconstruct his own privilege and interrogate his own complacency in terms of issues of gender, as he asks women to prove themselves, rather than understand the social differences between men and women. In addition, we fall prey to the liberal discourse, as we talk of gender as male or female, and do not understand how gender is not only a gender issue, but also intersects with the question of class, religion, disability, ethnicity and so on. Just addressing women and asking them to be like males is to continue the hegemony of males in the schooling system. So while we may take some positive messages from Fobi's remarks, it is also important to interrogate his social location as an Asante male. Fobi wants females to "prove him wrong" rather than his questioning the patriarchal structure of the schooling system. This kind of discourse is problematic, as it shifts the blame from the structure and system towards the individual. Having said that, the issue of gender needs to be addressed in terms of representation through the bodies that are prevalent, the text books that are used and resources in place. Educators can do this by making sure that their hiring policies maintain gender equity within schooling practices. In addition, educators need to recognize that addressing gender issues cannot just operate on its own but must be done by recognizing the diversity among the female student body in terms of class, ethnicity, disability, religion and language. Such issues intersect and diverge at some instances, but it is important to address it in its diversity of contexts that we can pave the way for gender equity in schooling.

4.4.5 Religion

Since religion is a marker of difference, it is important to explore how learners and educators take up religious difference in schooling. The following narratives look at some convergent and divergent views of the question of religion in schooling. Toura is an international student from Sierra Leone. He reflects on the status of religions and their followers from an outsiders point of view. He states:

> Yeah, what I noticed Christianity is in the majority. There is Christians and Muslims… Like the Christians. … They tend to look down on Muslim Yes. Especially those, Ghanaians from the north, they are inferior, things like that, they are not well educated, and one of my classmates told me that. "Oh we tend to look down those who are from the North." (File 00-IS-05: Text units 302–308)

Toura is looking at the question of religion and how this aspect of difference can render some bodies to be a minority. Here minority construction is not just taking place numerically but also through the question of power. In addition, Toura is

directing our attention to the interconnection between the issue of religion with the question of ethnicity. As seen in this narrative, Toura is pointing out how the majority of Muslims are from the North. Therefore, to address the question of religion, one must also address the issue of ethnicity, because it is difficult to separate the two and decipher whether one is being marked because of their religion or ethnicity or both. Toura is also connecting religion and ethnicity to the issue of class, as he points out that those in the South look at those from the North in terms of educational attainment, and therefore inferior compared to their southern brothers and sisters. There is a sense of cultural capital associated with belonging to the South, as compared to the North. This is a result of the allocation of resources that are much more prevalent in the South than the North. Therefore, to address the issue of religion we need to address the question of class and ethnicity at the same time, as they are fluid and interconnected. In addition, we need to understand that the question of religion also involves the construction of the 'other'. Here, Muslims are constructed as the other as they are a minority group. With minority construction operate power relations, as the majority render the minority group inferior through stereotypes and discrimination. Therefore, to deal with these issues we need to conceptualize it as not only religion as an aspect of difference, but understand it in terms of majority and minority relations and how the question of religion operates in this dynamic relationship. Interestingly, Toura does not discuss the issue of indigenous religions in this narrative. Paul, a male university student hailing from the Asante region brings up the issue of indigenous religions. He notes:

> I think because of Christianity, it has overshadowed the traditional African religions. Most people who engage in the traditional religion do not want to be seen or they do not come out plainly… I didn't understand why they didn't want people to know that this is what they are doing. And it was like the elders were saying its just because of the perception people have about them and not having a particular religious book to help. (File 01-GUS-39: Text units 291–299)

This is a clear example of internalized domination. It is important for educators to understand why certain people cannot come out with their religious identity. Religion and spirituality, while not synonymous, are interconnected. They are about worldview and understanding a sense of self. They are interlinked with one's identity and cultural knowledge (Dei, 2002; Shahjahan, 2004). They serve as a medium through which an individual is connected to a collective identity. Hence, to render such an important aspect of self to be invisible is to live an amputated life. Those who profess to have an indigenous faith have to go underground to practice their spirituality. They are not allowed to come out with their faiths. How does this jeopardize one's academic activity within schooling? This leads to a sense of inferiority and must be stopped. This narrative is a clear example of how difference can be used to exclude certain groups from participating in the everyday life of the university. Dominant groups can use their attitudes to maintain power and control over other groups. It seems as though colonialism has penetrated Ghanaian society so that one has to have a religious text to support their form of spirituality. Christianity as a majority faith has forced other forms of spirituality to go underground.

4.4.6 Disability

Because of the long history of exclusion of people with disabilities, total inclusion in the educational environment is imperative and necessary to achieve inclusive schooling and a 'pedagogy of difference' in Ghana. It has been noted that people with disabilities comprise ten percent of the population in Ghana (Avoke, 2001). Unfortunately, disability is frequently associated with uncomfortable and distressful circumstances (Walker, 1982). How does this line of difference operate in the context of schooling? What are the challenges and tensions students experience with their disabilities? What can educators do to respond to these challenges? Ansa, from Kumasi, is a university student in the University of Winneba, with a physical disability, who was asked whether educators should take disability into their schooling practices. He passionately replies yes and states:

> Oh! to me, they have to do it, and I know it is in the Ghana constitution that they have to do it. … When they are teaching, they will talk nicely, but the practicality is the problem, because it is just like somebody attaching Church on Sundays they preach to them nice, but when they come do they do what they are preached? (File 03-DS-04: Text units 293–301)

Ansa points to how the issue of disability cannot be just read in pages but must be embodied in practice in the real world to address it properly. He is arguing as educators, that raising issues of disability in the special education classrooms in itself does not render these issues to be invisible, but rather actions need to take place that ensure that students and those who are involved with disability issues are actually doing something about it. Such a difference in terms of ability needs to be taken into account in the schooling process, as people with disabilities, despite their differences, are contributing citizens of the country. Hence, they cannot be left at the margins but must be brought to the center of the schooling process. Serko, who is a visually impaired male student at the University of Winneba, eloquently points out that he has the same rights to resources needed for his learning as any other able bodied student. He states:

> I have to admit that I belong to the minority. Because if I don't have books and Braille, if I don't have the facilities that will make me work or enhance on my academic work and that sighted colleagues are provided. In this case because I am the minority that is why I am not considered. Because when we make a proposal is like the cost involved, but if I am part of the country and there is a policy for each and every citizen of the country then whatever I need to enhance my total development, then I believe it doesn't matter the cost I need to be given, provision should be made. But if funny reasons are given then it means I have been marginalized so to speak. (File 03-DS-03: Text units: 264–274)

Serko notes that he is constructed as a minority because of his disability. But his disability is ignored. Resources that are in place ignore his disability and so he is left to fend for himself. He points out that when disability issues are brought up the issue of cost is raised as a mechanism to silence him. But he resists this silencing by pointing out that he is a citizen of the country like everyone else, hence he has a right to be treated an equal partner in the schooling process, no matter what the cost. He argues that as a citizen of Ghana, his total development should be given as much attention as any able-bodied person; otherwise, this is to render him as an

invisible member of Ghanaian society. Serko and Ansa's narratives and their words are embodied forms of resistance that show how students with disabilities resist the temptation to accept things the way they are. They acknowledge that they are full participants in schooling and Ghanaian society, but their full capacities are not acknowledged and integrated because their issues are discussed, but nothing is done about it, or, resources are not put in place to address their needs because the discourse of cost effectiveness is employed. In addition, they see themselves as minorities, as their needs are silenced or their capacities are rendered invisible. As educators we need to work with students like Serko and Ansa to find creative solutions on how such issues can be addressed. Simply silencing and ignoring them perpetuates the problem and forces us to reinforce a certain form of normalcy (Davis, 1995). Thus, Serko and Ansa are not asking for 'special' treatment, but are asking educators to see them as equal participants in schooling and Ghanaian society who have needs that must be addressed so that they can navigate through Ghanaian schooling smoothly.

4.5 Evaluation

The voices of our participants clearly articulate the importance of acknowledging the difference and diversity of bodies that navigate through the Ghanaian schooling system. To ignore any such difference, by assuming that the population is homogenous, is to render certain bodies invisible. To render certain bodies invisible is to ignore their needs and capacities to fully contribute and get something back from Ghanaian schooling. Schooling is meant for everyone in a democratic society (Giroux, 1992). To leave any body behind is to negate their democratic rights as a citizen of the country. While nationalist discourses are employed to shove away differences using the rhetoric of sameness, these dominant discourses need to be problematized and understood in the context of whom such discourses are including and excluding. Schooling is an integral part of citizenship building that is slowly being tarnished in the world, as cost is taken into account and hence the needs of majority are addressed at the expense of minority schooling (Portelli & Solomon, 2001). Since it is more cost effective to address the needs of the many rather than the few, it perpetuates a narrow vision of the kind of experiences that learners bring to the classroom and their peers. It does not take into account the holistic vision of contributions that take place when all are empowered and feel they belong in schooling; hence, they will add more than take away from the schooling experiences for all. As we see from the subject narratives, minoritized bodies have valuable, yet inequitable experiences, values and norms to contribute to Ghanaian society and schooling. To ignore and devalue such contributions is to ignore the richness of knowledge that is part of society and in turn, it perpetuates the social inequities prevalent in Ghanaian society. Ghanaian schooling can act as a site for the critical dismantling of existing inequities and evoke social justice and equity for all by employing a pedagogy of difference. What does this pedagogy of difference look like?

Different bodies bring different readings to their schooling experiences and how they see difference playing a role in Ghanaian schooling. If we see schooling from one point of view, we miss the complex picture of interactions that take place in schooling and the impact learning has on a learner's self worth, self-esteem and life aspirations. It is by listening to the different voices that we can ensure all needs are taken into account and understand that schooling is a dynamic process where teachers, students, administrators, parents and community form a tapestry of experiences that contribute to the learning of all. To silence any such voice is to render their experiences, knowledge, self worth and aspirations as unimportant and invisible. This is not detrimental for the bodies whose voices are subjugated, but it is to jeopardise the dynamic process of knowledge production and create a 'monoculture of the mind' (Shiva, 1995), where one worldview and one voice dominates. A pedagogy of difference sees to it that difference is evoked by listening to different voices and to understand the context from which such voices are raising issues. It is not the case that we need to listen to all voices equally, but we need to interrogate the social locations from which these voices are emerging and understand that certain voices have been historically silenced and marginalized. It is by making a space and putting these marginalized voices in the center that we can truly evoke a pedagogy of difference that leads to democratic possibilities in schooling.

A pedagogy of difference cannot operate unless we see how various lines of difference converge and diverge in different contexts. Learners, teachers, administrators, parents and so on, having multiple social locations because of their ethnicity, class, gender, ability, religion and language can render them sometimes in positions of privilege and at other times at the periphery. It is by understanding how these interlocking systems of oppression operate that we can truly bring to fruition a pedagogy of difference. As educators, a pedagogy of difference cannot be achieved, unless we understand how these issues are interconnected, and to only act at one site of difference, does not solve the problem. Learners may be silenced because of their class, ethnicity and gender and to just address the issue of class, not only solves the problem but perpetuates the problem by ignoring important aspects of the learner's sense of self that are interconnected with their gender and ethnicity.

A pedagogy of difference can take place when issues of difference are functional at all levels of schooling (primary, secondary and tertiary) and when the question of representation takes place in the context of bodies, curricula, the distribution of resources, scheduling of holidays, and so on that are an integral part of the schooling experience. The issue of belonging and learner's engagement play an important role in terms of their academic success. Education is meant to be empowering. A sense of place in the schooling process will determine whether students feel as if their identity is being affirmed or negated. Minority students cannot remain at the periphery but need to be integrated. As one of our narratives argued, it is easier to deal with the majority rather than the minority in the case of students with disabilities, for example. As educators we need to take the challenging road to understand that this is a complicated process, and there are so many needs to be addressed. It is by incorporating the question of difference at all levels that difference is celebrated and a pedagogy of difference can pave a way for equity and social justice for democratic schooling in Ghana.

Lines of difference need to be also understood in the context of majority and minority construction to understand the power dynamics that are at play here. In a pedagogy of difference it is very important to ask: Who is a majority? Who is a minority? What are the relations between the two? Our narratives demonstrate that the schooling process is not a level playing field for all and some bodies have advantages over others. How these advantages reveal themselves depends on which difference we are discussing and in what context. As our narratives demonstrate, who is a majority and who is a minority has important implications on the question of who gets included and who gets excluded in the schooling process. There are many markers of difference playing a role here in terms of constructing who is a majority and minority. Majority and minority construction occurs across many lines of difference such as religion, class, ethnicity, gender, ability and language.

4.6 Conclusion

As educators we need to keep in mind the interlocking system and address minority and majority relations in its totality rather than across a single line of difference. It is also important for educators to keep in mind the fluidity of such categories, and that majority-minority relations is context dependent.

Nationalist discourse is employed by some to deny that there are differences among the population, and that everyone should be treated the same. This kind of discourse tends to marginalize those who do not fit into the neat categories of an ideal Ghanaian, and our narratives indicate that there are many differences across lines of gender, ethnicity, language, abelism, class, religion and so on among the Ghanaian population. Employing a nationalist discourse masks the fact that the majority's priorities are addressed at the expense of those who are the minority.

As a result, the power differential is not addressed but ignored. It also continues to deny the historical and social underpinnings of what bodies remain full citizens, and who remains at the periphery. And as we discuss minority integration, we don't mean in terms of acknowledging the minority groups on a part time basis that happens one day and is forgotten for the rest of year. Instead, it is to see such learners as equal participants of the schooling process, and fully integrating their identities in every step of the schooling process.

Within our schooling systems, dominant bodies need to undergo education where they can implicate themselves and understand their role in perpetuating inequities in the schooling process that excludes many of their peers. Raising awareness is the first step, but we cannot celebrate after reaching this. Addressing it has to go hand in hand with raising awareness of the issues of minority schooling in Ghana.

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Chapter 5
Access Denied: A Story of Resistance

Teresa Van Deven

… the interpretation of medium-of-instruction policies, and the debates surrounding them, must be situated in their sociopolitical contexts, which are inseparable from their historical contexts.
(Tollefson & Tsui, 2004, p. 3)

5.1 Introduction

For many Hong Kong students graduating from local secondary schools, access to university entrance and access to job placement is being denied because students are graduating with low levels of competence in both the Chinese and English languages. In response to this situation, many sectors of the Hong Kong community believe that the reason for this degree of incompetence stems from the medium of instruction policy instituted in Hong Kong after the 1997 Handover. Prior to 1997, the choice of medium of instruction was left in the hands of each individual secondary school; despite the recommendations of numerous educational consultancy reports recommending the use of mother-tongue education, most schools opted to use English as the medium of instruction. After the Handover, out of 421 government and government-subsidized secondary schools, only 114 met the criteria and were granted approval to continue to use English as the medium of instruction; the remaining schools were mandated to use Chinese as the medium of instruction. Four years after the implementation of this policy, "there is plenty of evidence that students have actually benefited from learning in their mother tongue" (Tsui, 2004, p. 99). Despite the evidence that mother-tongue education has benefited the students, there continues to be strong resistance to this mandated medium of instruction policy as parents, teachers, and the business sector continue to strongly object to the use of Chinese as the medium of instruction.

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The particular *story* of resistance is not the only example of resistance in Hong Kong. It has been 7 years since Hong Kong celebrated the 1997 Handover. The return to Chinese sovereignty in 1997 and the "one country two systems" has placed Hong Kong in a unique situation. Reaction to Hong Kong's return to the motherland were most definitely mixed: many celebrated the Handover fiesta, while others thought that this "would more appropriately have been organized as a wake", since for many, this marked "the end not the beginning of Hong Kong's only real comparative advantage as the gateway to China" (Roche, *South China Morning Post,* January, 13, 2003, p. 1). In these 7 years, the people of Hong Kong have valiantly struggled through an economic recession, an increased unemployment rate, SARS (severe acute respiratory syndrome), the anti-subversion bill of Article 23 (an anti-subversion law dealing with treason, secession, sedition, subversion, and theft of state secrets), the ongoing furor over the reclamation plans for Victoria Harbour, the threat of avian influenza, the struggle for universal suffrage in 2007/08, and most recently, the debate over who is and who isn't a patriot. In July, 2003, nearly one million Hong Kong citizens marched in resistance to the anti-subversion bill of Article 23; there are plans for yet another march in July, 2004. Since the Handover, the citizens of Hong Kong have raised their voices in resistance to a number of issues affecting their country.

But amongst all these examples of resistance, perhaps the most ongoing story of resistance in Hong Kong is the resistance to mother-tongue education. This chapter will explore the historical, pragmatic and possible ideological reasons for this resistance.

5.2 Language as Culture

> Every colonized people—in other words, every people in whose soul an inferiority complex has been created by the death and burial of its local cultural originality—finds itself face to face with the language of the civilizing nation; that is, with the culture of the mother country (Fanon, 1967, p. 18).

Fanon believes that language represents far more than syntax and morphology; he states that to speak means "to be in a position to use certain syntax, to grasp the morphology of this or that language, but it means above all to assume a culture, to support the weight of a civilization" (1967, p. 17). Crystal (2000) uses a Welsh proverb to express the relationship between language and identity: *"Cenedl heb iaith, cendle heb galon"*, which translates into English as: "A nation without a language is a nation without a heart" (p. 36). Hockett (1958) once stated that language is "the most valuable single possession of the human race" (ch.1, line1).

Within the scientific discourse on language, linguists believe that language is a simple representation of reality, and it is assumed that such a correspondence can only be arrived at in the *most advanced* of all languages, namely, English (Fernando, 1986). According to Fernando (1986) this belief has led to two fallacies: the Western notion that language is capable of describing the whole of nature alone,

and the fact that English *alone* is capable of describing nature; other languages, such as Asian languages, do not have the full range of concepts necessary for this purpose. Throughout history, indigenous languages have been "treated as backward and uncivilized and seen as something that must be eradicated in order for the country to become modernized" (Tollefson & Tsui, 2004, p. 3). For many, English is seen as a neutral medium for gaining important knowledge, while in some countries, such as Singapore, a neutral medium for inter-racial communication, and an absolutely essential language for participating in the global economy. However, in many instances, English has led to deculturalization, and at the expense of the mother tongue, many second language English speakers have ended up with no culture, and many can speak English far better than their mother tongue: "The dominant discourse of pragmatism (English for science and technology), multiracism (English as a bridge across races) and meritocratism (English as the crucial gatekeeper to social and economic prestige) has constructed a complex and ambivalent discursive field around English" (Pennycook, 1994, p. 256). In many instances, the English language, therefore, has been seen as a "symbol of colonial rule, political suppression, inequality, power and affluence, rather than as a means of communication" (Tsui, 1996, p. 241).

The adoption of a colonial language as the lingua franca is "analogous to economic and military imperialism, except that it is even more pervasive and penetrating because the domination is not just economic, but also cultural and ideological" (Tollefson & Tsui, 2004, p. 5). In Hong Kong, despite the fact that Cantonese was the usual language spoken by over 90% of the population, English remained the official language until 1974. Perhaps even more remarkable, is the fact that even after political independence, the people of Hong Kong have protested against being educated in their own tongue, and are demanding education in the former colonial tongue. Tsui (2004) states that English-medium education has sustained a population that is "devoid of cultural heritage" (Tollefson & Tsui, 2004, p. 10).

5.3 Resistance to Mother-Tongue Education

Prior to the Handover, over 90% of students in Hong Kong secondary schools were studying in English-medium schools, but by 1998, only about 114 government and government subsidized schools were granted approval to continue to use English as the medium of instruction. The irony of this situation is that after 150 years of colonial rule, it would appear that the Hong Kong educational sector is not yet prepared to relegate English to a position of secondary importance; since the enforced use of mother-tongue medium of education, many have felt that schools adopting Chinese-medium of instruction (CMI) are "second-class schools and their students, second-class students" (Tsui, 2004, p. 99). Resistance to this mandated change was demonstrated from all sectors of the community. In response to the uproar from parents, teachers and the business sector, a working group has been appointed to review this controversial medium of instruction policy. There is a strong appeal

to this working group that the upcoming consultation document will eventually allow Hong Kong's secondary schools to revert to the post-colonial era and be able to choose for themselves which language they will use as the medium of instruction.

Historically, there has been ongoing debate over the medium of instruction in Hong Kong. Under the British regime, the choice of medium of instruction had been left in the hands of the schools; English was the preferred medium of instruction despite numerous educational consultancy reports recommending mandatory mother-tongue education – the importance of maintaining equal emphasis on both Cantonese and English has been reiterated in almost every educational document, yet "the rhetoric never seemed to be translated into action" (Tsui, 1996, p. 242). Even as early as 1860, Frederick Stewart, who eventually became the Chairman of the Educational Committee, recommended that an education using a foreign language would affect the quality of learning. A longitudinal study (Marsh et al., 2000) indicated that while there were positive effects on students' English proficiency for those students studying in EMI schools, there were negative effects in other subjects such as science, geography, and history. Despite these findings, English medium schools continue to hold a position of prestige.

5.4 Why Am I [a] Chinese and I Can't Speak or Write Good Chinese? (Secondary One Student, Hong Kong, 2004)

To answer this question, one must look a little more closely at the mandated language policies in Hong Kong secondary schools. Unfortunately, the situation surrounding medium of instruction surpasses the two-way debate over EMI or CMI. If we look at individual schools, it becomes even far more complicated; while the government has mandated that Chinese-medium of instruction must be used in approximately 400 secondary schools, this mandate only applies to Secondary One through Three. After Secondary Three, schools have the discretion to choose to use EMI or CMI for Secondary Four through Secondary Seven. Although the A-level examinations can be written in both Chinese and English, most schools believe that students who use English for the A-level examinations will receive preference over those using Chinese in terms of placement in post-secondary institutions, as almost all of the universities in Hong Kong continue to use English as the medium of instruction. Thus, the reality of the situation is that students entering CMI secondary schools study all subjects in Chinese until Secondary Three, and then the language of instruction is switched for many by the time they reach Secondary Four. Added to this complicated situation, many students entering Secondary One are coming from English-medium Primary Schools and do not have the vocabulary or reading skills necessary to study all subjects in Chinese. Once they become comfortable using Chinese during their Secondary One through Three years, they then switch to English after 3 years of studying in Chinese.

Despite research indicating that there are qualitative differences between learning and teacher-student interaction in terms of language of instruction (Ng et al.,

2001) and, despite the fact that students themselves are finding that not only can they not master English, they also are finding that they have weak Chinese language skills, parents still aspire to having their children study in EMI schools and many individual schools continue to switch to English-medium of instruction from Secondary Four through Secondary Seven. There are far more questions than answers in terms of the language situation within Hong Kong secondary schools. Perhaps by focusing on the ideological beliefs, it is possible to glimpse into some of the *plausible* reasons for this complicated and perhaps debilitating situation.

5.5 Ideological Invisibility

> …the very insidious nature of ideology is its ability to make itself invisible.
>
> (Freire, 1998, p. xiv)

Fay (1987) talks about the "Parable of the Cave" in Plato's *Republic*: "Down in the bowels of the cave, chained in such a way that they can only see the shadows of objects projected on the wall in front of them, ordinary humans live in a world of illusion which, in their ignorance, they take to be real" (p. 10). Fay uses Plato's parable as a metaphoric picture of life – the notion that ordinary existence is based on fundamental illusion, but that those living it are not aware of this fact. In terms of language education in Hong Kong, parents who can not enroll their children in English medium schools view the policy as jeopardizing their children's future, and the business community continually warn that a decline in English standards will compromise the competitiveness of Hong Kong. The 'buzz' word within the educational and business sectors is that in this globalized economy, Hong Kong can not participate as an international city if it does not maintain or improve its English standards. There is no argument that in order to participate in today's global economy, one must have access to English, but it could be argued that the very concept of globalization "has achieved such widespread exposure and has become such a powerful explanatory device and guide to action that it sometimes appears almost unquestionable" (DuGay, 2000, p. 115). English continues to be interwoven with global discourses of economic development and has an obviously important role in facilitating international communication, but it becomes problematic when this must be at the expense of other languages. There is, of course, no argument that bilingualism is an asset to any individual; however, Crystal (2000) calls for the notion of "healthy bilingualism" (p. 81). He states that healthy bilingualism is a state in which "two languages are seen as complementary, not in competition—fulfilling different roles, with each language being seen in a rewarding light" (p. 81). Without this notion of bilingualism, one culture assimilates another.

Akkari (1998) points out that "when you are talking about language, most of what you are talking about is the culture…the way of thought, the way of valuing, and the human reality that you are talking about" (p. 115). So the question that needs to be asked is: *whose* language is being taught and *whose* culture and values are being transmitted, validated and reproduced? To what extent has the policy of

linguistic assimilation made it impossible, or extremely difficult, for students to develop a language that allows them to fully function in all domains? To what extent has the role of English as gatekeeper in Hong Kong been questioned? To what extent has the ideological belief that English medium education is the key for the future success of Hong Kong students, and ultimately, Hong Kong itself? Perhaps there are no immediate answers, but, rather, perhaps it is time to simply question. As mentioned previously, despite the fact that educational consultancy reports have repeatedly recommended mandating mother-tongue education, and despite the recent research indicating poor performance factors in mathematics, geography, history and science for students studying in EMI schools, (Marsh et al., 2000); (Ng et al., 2001), and in spite of Hong Kong's post-colonial status, the community continues to demand a reversal of policy to revert to the pre-colonial language policy that allows schools to choose the medium of instruction. As of February, 2003, it was announced that the schools waiting to adopt English as the method of instruction may have to wait longer than previously planned because the Education Commission working group reviewing medium of instruction policy may be unable to meet its September, 2006 deadline. This delay in the consultation document has caused great disappointment as schools have been "looking forward to the change in the language education policy, which has caused a lot of controversy…any delay is a setback" (*Student Standard*, February, 2004, p. 3).

5.6 Post-colonial Hong Kong

Kelley (1999) warns that in most post-colonial countries, the "official apparatus might have been removed, but the political, economic and cultural domination still remain with some alteration" (p. 18). Oliga (1996) reiterates this point as he speaks of the "double emancipatory problematic" facing countries during the post-colonial era. He believes that not only do such societies have to contend with their internal problems, but that they also have to contend with the "external imperialistically induced lopsidedness in societal development (p. 274). He concedes that, of course, the colonial political domination of these countries is largely a matter of the past, but that the legacy of a "warped society and its continual renewal in new forms of veiled imperialism continue to play their economic, political and sociocultural games" (p. 274). Pennycook speaks directly to post-colonialism in Hong Kong as he argues that the "mighty symbol of the governor sailing away masks the crucial issue that the traces left by colonialism run deep" (1998, p. 2).

This continuing resistance to mother-tongue education appears to be jeopardizing students' learning in Hong Kong, and yet, the public continues to demand English medium education. Tsui (2004) states that after 4 years since the implementation of mother-tongue medium of instruction, "there is plenty of evidence that students have actually benefited from learning in their mother tongue" (p. 99). Tsui goes on to state:

> The history of the medium-of–instruction policy in Hong Kong under the colonial regime and the implementation of the new medium-of-instruction policy in the post-colonial era richly demonstrate that medium-of-instruction policies are shaped by an interaction between political, social, and economic forces (2004, p. 113).

Tollefson and Tsui (2004) contend that "behind the educational agenda are political, social, and economic agendas that serve to protect the interests of particular political and social groups" (p. 2). Thus, in this post-colonial era in Hong Kong, whose agenda are they serving? Why does the community continue to struggle to maintain a medium of instruction that has so obviously been shown to have negative effects on students' learning and ultimately on students' access to success? It would appear that the power of the colonial agendas and ideologies continue to permeate Hong Kong's consciousness. How is this possible after 7 years as a post-colonial country?

Freire sees power as a form of domination that is not "simply something imposed by the state through agencies such as the policy, the army and the courts. Domination is also expressed by the way in which power, technology and ideology come together to produce forms of knowledge, social relations, and other concrete cultural forms that function to actively silence people" (1985, p. xix). He believes that domination is subtle; it can be seen in the ways in which the oppressed internalize and participate in their own oppression. So, how can Hong Kong move beyond this fog of domination? Althusser (1969) states that cultural action for freedom can be satisfied neither with the mystifications of ideology nor with a simple moral denunciation of myths and errors, but must undertake a rational and rigorous critique of ideology. Geuss (1981) reiterates this notion as he asks the question: "Once the agents are *in* the situation, how can they ever get out of it?" (p. 60). He answers this question by stating that the "usual answer is that agents are enlightened and emancipated by a critical theory" (p. 61). However, he concedes that although it is possible that 'agents' may know enough to reject their basic social institutions, "they may not know much more than that about where their true interests lie, they may not trust themselves to predict what interests they would form in a liberated society" (p. 75).

So, the question remains, how does a society move from enlightenment about a condition – a firm understanding of the imposed oppression – to an understanding of how the "oppressive power that dominates us can be broke, and how a different, more humane and just world can be brought into being and be sustained" (Nielsen, 1992, p. 282)?

5.7 Ideology in the Pejorative Sense: An Interpretive Analysis Using Fiction as Data

Geuss (1981) states that the term '*ideology*' can be used in many different ways; he distinguishes three different research contexts within which theories of ideology have been developed: ideology in the descriptive sense, ideology in the pejorative

sense, and ideology in the positive sense. He further states that "corresponding to each of these three research programs there will be a family of ways in which the term *'ideology'* is used" (p. 4). To address the questions of language issues in Hong Kong, looking at ideology in the pejorative sense may serve to identify some *plausible* explanations as to why English medium education has continued its strong hold in Hong Kong.

The term ideology is used in the pejorative sense "to criticize a form of consciousness because it incorporates beliefs, which are false, or because it functions in a reprehensible way, or because it has a tainted origin" (Geuss, p. 21). Geuss calls these three kinds of criticism: "criticism along the epistemic, the functional and the genetic dimension" (p. 21). By looking at the genetic dimension, it may serve to demonstrate that the origins of English language medium of instruction are indeed '*tainted*'. Geuss has warned, however, that there is a long history of criticism of the "genetic fallacy" as "one hasn't shown anything about the truth or falsity of a belief by showing how it arose" (p. 21). He further states that the causal history may explain "*why* it is inappropriate, but the causal history isn't *itself* the grounds for rejecting it; its inappropriateness is" (p. 20).

There are numerous ways of looking at the genetic dimensions, and an historical outline of language education and language education policies may serve to demonstrate how these language *beliefs* arose and continue to be sustained. However, perhaps it is possible to look into other dimensions – such as genuine artifacts of literature. One could devote an entire chapter to discussing the validity of using fiction as datum; Mishler (1990) has stated that using interpretive analysis" does not mean that we would necessarily be compelled or persuaded by the findings of any particular study, or agree with the proposed interpretation" (p. 38); on the other hand, one can not ignore the power of fiction: "The strength of a powerful piece of fiction, one that informs and helps us understand, lies in its structural corroboration—its coherence with the human condition and credible possibility" (Kilbourn, 1999, p. 27). The purpose of analyzing pieces of literature is to demonstrate the extent to which many of the concepts and beliefs around English language teaching and the role of English prevalent in certain novels are still very much prevalent in today's classrooms; using literature *may* enable us to learn from the problematic nature that emerges from these novels and *may* address how the views of discourse from these novels come to bear in a real-world setting.

5.8 Robinson Crusoe

> He is the true prototype of the British colonist, as Friday (the truly savage who arrives on an unlucky day) is the symbol of the subject races.
>
> (James Joyce as cited by Hamm, 1996, p. 118)

Over 700 editions of Defoe's *Robinson Crusoe* have been issued; one critic has stated that it is has been "re-issued more often than any other book except the Bible. The story has been translated into nearly every written language, and it has been

abridged both for adults and children" (Crowley, 1972, p. vii). There has always been an immense attraction to this piece of literature; even Rousseau gives *Robinson Crusoe* a special place in the education of his main character in *Emile*. Many of the concepts found within Crusoe's adventures predict and foreshadow the modern age especially in terms of the many facets of colonial relationships – Crusoe's project to mould Friday to fit his own agenda, and Crusoe's teaching of language are all echoes of colonial discourse. Phillipson (1992) has posed the question: "To what extent are teachers teaching in Crusoe's footsteps (p. 110)? Phillipson sees Crusoe as the "epitome of imperial mastery, a key figure in the European attempt to gain political and economic mastery over vast areas of the world" (p. 109).

Defoe devotes his opening pages describing Crusoe's origins: "I was born in the Year 1632 in the City of *York*, of a good Family (Defoe, 1972, p. 3). He describes Crusoe's future chances of success had he chosen to stay in his own country: "Being the third Son of the Family, and not bred to any Trade, my Head began to be fill'd very early with rambling Thoughts" (p. 3). Crusoe's career choices looked rather grim, and in his mind, he was certain that he would be satisfied with nothing but going to sea: "Apprentice to a Trade, or Clerk to an Attorney; that I was sure if I did, I should never serve out my time, and I should certainly run away from my Master before my Time was out and go to Sea" (p. 6). By stressing Defoe's detailed description of Crusoe and his family it serves to juxtapose the lack of background offered on Friday – Defoe does not give due weight to Friday's origins – when Crusoe finally meets Friday's father, no background information is given on his family; instead, Crusoe is most surprised at the affection between the two men: "It is not easy for me to express how it mov'd me to see what Extasy and filial Affection had work'd in this poor *Savage*, at the Sight of his Father" (p. 238).

In Crusoe's vocabulary, the natives are what he calls the '*savages*'. After more than 20 years of solitude, Crusoe laments his loneliness: "O, that there had been but one or two, nay but one Soul sav'd out of this Ship; to have escap'd to me, that I might have had but one Companion, one Fellow Creature to have spoken to me…" (p. 188). However, when he first sets eyes on Friday he can not imagine him to be a "Companion" nor a "Fellow Creature"; instead, "It came now very warmly upon my Thoughts, and indeed irresistibly, that now was my Time to get me a Servant" (p 202). Crusoe describes Friday in a lengthy and positive portrait and he states the he displayed manliness and yet also "the Sweetness and Softness of a *European*" (p. 205). He rather liked the look of Friday because he didn't have the "ugly yellow nauseous tawny" skin nor that "bright kind of a dun olive Colour" (p. 207). Echoes of Crusoe's description of Friday reverberate in an article written for the *Nesta News*, a monthly bulletin published by the Native-English Teachers in Hong Kong. The article, written by a Native-English teacher talks about his adventures in "Gnok Gnoh" (which, of course, is backwards for Hong Kong), and of his "mistrustful" co-workers who criticize him; he makes references to his "miscreant" students who shed their "yellow blood" on his shirt while breaking up school room fights" (*Nesta News,* November, 2002, p. 6–7).

Like a creator, or god or a father figure, Crusoe shapes Friday into a "faithfull, loving, sincere Servant" (p. 209). Friday becomes a model, the epitome of the good

pupil, and the good and honest servant: "I was greatly delighted with him, and made it my Business to teach him every Thing, that was proper to make him useful, handy and helpful; but especially to make him speak and understand me when I spake, and he was the aptest Schollar" (p. 210). Throughout the novel, Friday is "imprisoned in his master's discourse, named by Crusoe, taught to speak by him, clothed in uncomfortable skins, taught what to eat and what to believe, and then allowed no more than occasional lines of "implausible broken 'English' of his own" (Jones, 1996, p. 225).

The type of relationship between Friday and Crusoe is reflective even today of relationships between some English language teachers and their students – there is often very little effort by the teacher to learn the language of the students; instead, like Crusoe, the teachers assume mastery over the students and make little or no use of the native language within the classroom setting. Cook (2003) discusses this model of language teaching called the Separation Model. In this model of language teaching, the relationship between the two languages is seen as languages being in "watertight compartments.…the second language user speaks either one language or the other, with no connection between the different languages in the mind" (p. 6). Within this model, code switching is deplored rather than commended (Genesee, 2002), and the language teaching methodology teaches "without reference to the first language and discourages its use in the classroom—hoping students will build up a new language system with no links to the first" (Cook, 2003, p. 6). Crusoe is plagued by images of savages after seeing the first footprint in the sand: "I fancy'd it must be the Devil" (p. 154). This savage imagery is still predominant in the discourse of English as an International Language: "Nevertheless, while this moral imperative to educate in English (Anglicism) was an extremely significant new development in the discourses of colonialism, it did not replace the early view of the '*noble savage*' (Orientalism) but rather started operating along side it" (Pennycook, 1994, p. 325).

The important role of the native English speaker (as the 'teacher' Crusoe) still persists today; this is evident in the many expanding Native-English teaching programs around the world. In Hong Kong, the figure of the native speaker is still that "idealized person with a complete and possibly innate competence in the language" (Pennycook, 1994, p. 175). In December, 2003, some educators called for the government to cancel the Native-English Teaching Program (NET) scheme due to the substantial funding cuts in the education sector; but within 24 h, a retraction was printed in many of the local newspapers in Hong Kong stating that there was no possibility of cutting the Net program and that they had been misquoted. Despite funding issues, criticisms over the scheme, and the additional allowances available to the Nets, the Education and Manpower Bureau (EMB) deputy secretary Chris Wardlaw clearly stated that "the scheme must go on" (*South China Morning Post, Education*, December, 6, 2003, p. E3). The President of the Professional Teachers Union (PTU), Cheung Man-kwong reiterated this, stating that Nets are "important to Hong Kong if it wants to be an international city" (*SCMP,* December 6, 2003, p. E3). He went on to say that not only should the program not be cut, "there needs to be more NETs" (p. E3). While the NET scheme costs about $500 million per

year, on the other side of the argument, one English secondary school teacher stated that “there is not much difference between local and NET teachers in their teaching ability…Nets may benefit schools by bringing in more new teaching methods, but we have many creative local teachers too. We need to have an objective and systematic mechanism to evaluate NET teachers’ performance to see what to do with the scheme” (p. E3). The resistance to abolishing the Net scheme in Hong Kong seems to go hand in hand with the resistance to mother-tongue education. It would be an exaggeration to suggest that Defoe’s model of the native English teacher is the *cause* of the dominant role the native-English teacher plays in many educational settings throughout the world, including Hong Kong, but it would perhaps be enough to say that the very category of native speaker competence has to be re-evaluated and stripped of its mystique; it is perhaps necessary to re-evaluate the “cherished linguistic paradigms such as native-speaker authority” (Parakrama, 1995, p. xiii).

Defoe, of course, has his critics, but he also has an impressive following of supporters: “Coleridge found Defoe decidedly superior to Swift and praised him for the nobility of his moral sentiments as well as for his characterization of Crusoe as a “representative of humanity in general” (Crowley, 1972, p. ix). Swift, who appears as though he is unworthy of Coleridge’ s praise, may represent the voice of the Other: as his main character in *Gulliver’s Travels* journeys to the land of the Houyhnhms, he states that his “principal endeavor was to learn the language” (Swift, 1967, p. 239) of the Houyhnhms. He tells us that the Houyhnhms were impressed by his “teachableness, civility and cleanliness” (p. 239) and they were therefore uncertain as to whether or not he was actually a *Yahoo*. Swifts’ character does not naturally assume that this society of horses should learn his tongue and ways; he is enthralled with this society of horses and quickly learns to adapt to their language and customs; “The wise and virtuous Houyhnhms, who abound in all excellencies that adorn a rational creature” (p. 310). Swift’s perception of learning from the Other can then be juxtaposed to Defoe’s character, Crusoe. Spaas (1996) writes:

> Through Friday, the Western ethos, which permeates the novel, is fully developed. With the arrival of Friday, a social relationship is initiated: ‘natural’ inequality and hierarchy emerge, the era of self-sufficiency ends and a master-slave era begins. The underlying mercenary values and notions of colonial superiority will raise fundamental issues. (p. 320)

5.9 Pygmalion

> HIGGINS: But you have no idea how frightfully interesting it is to take a human being and change her into a quite different human being by creating a new speech for her.

Audiences around the world may have two very different interpretations of this story: some may rejoice in Eliza’s ‘*transformation*’; however, some may argue that this was not Shaw’s intent at all (Belsey, 1979). It has been argued that Shaw wrote this play to parody the nineteenth-century efforts towards standardization. Belsey

writes that *Pygmalion* is about language but few of the many critics who have written about this have "considered its linguistic issue in depth" (1970, p. 42).

Higgins' phonetic game of guessing people's origins in Act I sets the tone of the play; Eliza is fearful of the note taker behind the pillar of St. Paul's Church, and she fearfully denies having said anything of significance to him: "so help me, I never spoke to him except to ask him to buy a flower off me…I take my bible oath I never said a word" (Eliza, 674). Higgins orders her to "cease this detestable boohooing instantly" (679). He declares that she has no right to speak at all. At the beginning of the play, Shaw paints a portrait of a woman imprisoned in poverty by her inarticulate speech: "The English that will keep her in the gutter to the end of her days" (Higgins: 680). Eliza thinks that to talk "more genteel" (688) will solve her problems; unfortunately, as the play nears the end, she asks what will now happen to her now that the experiment at the embassy reception is complete. Higgins consoles her: "I daresay my mother could find some chap or other who would do very well' (750). Despite Eliza's success at the embassy reception, even after mastering her genteel speech, Higgins continues to treat her as an inferior being; he refers to her as an "infamous creature" (752), a "heartless guttersnipe" (753), and an "idiot and a fool" (776). The end of the play finds a very displaced and alienated Eliza: "I'm a slave now, for all my new Clothes" (777); "You know I can not go back to the gutter, as you call it, and that I have no real friends in the world but you and the Colonel" (779).

Many of the language issues Shaw explored in his play are still very prevalent today. Cummins (1989) states that in terms of language and culture, the educator's role definitions can be characterized along an "additive-subtractive" dimension. He states that educators who "see their role as adding a second language and cultural affiliation to students' repertoire are likely to empower students more than those who see their role as replacing or subtracting students' primary language" (p. 139). Shaw's play demonstrates the subtractive dimension of learning; it clearly demonstrates that this dimension of learning leads not to enhancement but alienation. However, throughout the world, Higgins, armed with his subtractive style of teaching, is often viewed as the ultimate language teacher. A 12-year old author in Hong Kong writes a novel about her visit to Australia; when she arrives, the weather is unfavourable, so she visits the hotel bookshop to find something to occupy her time. The main character in the novel, Danielle, returns to her room with an exciting find! She has found a copy of her favourite novel, "My Fair Lady" in the bookstore. She writes:

> *My Fair Lady* was an all-time favourite movie abut a common flower girl, Eliza Doolittle, who met Professor Higgins, a professor that studied the science of words and languages…Eliza did not talk well, always shortening and reading the words wrong. Professor Higgins did an experiment on her planning to change her into a duchess and inviting her to the Embassy Ball to meet the Queen of Transylvania.…At long last, an old friend of Professor Higgins met Eliza at the Ball where she behaved like a princess. The student praised Professor Higgins and made the professor's name famous all over Europe. (Fok, 2002, p. 56–57)

A textual analysis of *Robinson Crusoe* and *Pygmalion* serves to offer some plausible genetic reasons for the perceptions not only of the role of English in education

but also of the continued reliance on native-speaking teachers. Pennycook (1994, 1998) and Phillipson (1992) have both made reference to these pieces of literature in their discussions of English Language education; Crystal (2000) argues that in order to have a greater impact on language issues, we need "all hands—scholars, journalists, politicians, fund-raisers, artists, actors, directors—if public consciousness is to be realized sufficiently to enable something fruitful to be done" (p. ix–x). Spretnak (1997) reinforces this as she states that in "challenging the problematic elements of the modern world-view" we must do so not with "complaints but with fresh perceptions and creative alternatives" (p. 1).

5.10 Access Denied

In 2004, Beijing brandished Hong Kong's political democratic opposition party as *unpatriotic*, and has laid down new rules for political reform in Hong Kong. As Beijing begins its interpretation of the Basic Law, Hong Kong citizens plan for demonstrations in July, 2004. At this time, Hong Kong is facing new challenges, but perhaps one of the most significant is the need to recognize the importance of language issues in the education sector, and how it is impacting Hong Kong's future. By focusing on the existing social, political and economic situation in Hong Kong, it becomes obvious that the education sector must be cognizant of the country's future needs. Education will play a significant role in restructuring and revitalizing the economy. The quality of local education in Hong Kong has long been criticized; recently, it has become known that many of the senior civil servants making key decisions on educational reform have chosen not to utilize the educational system in Hong Kong and have chosen to send their children to schools overseas. It was estimated that approximately $860 million dollars was forked out for civil servants' education allowance for the 2002/3 financial year (Hui & Michael, *South China Morning Post*, February 9, 2003, p. A2). Ms. Ho, a member of Legco's education panel stated that these government officials were sending out "mixed messages to the community by preaching the virtues of the local education system while personally shunning it" (p. A2).

Public examination results continue to show a decline in both English and Chinese language standards. Rather than focusing on the issues of medium of instruction, most interestingly, it appears that the blame for these low standards has been placed at the feet of language teachers in Hong Kong. Incredible amounts of time, money and energy have been devoted to tackling the language problem. Two years ago, the Language Benchmark policy was implemented whereby all language teachers, both English and Putonghua, were required to take a benchmark test in order to continue teaching in the system. More recently, a consultation document, entitled 'Action Plan to Raise Language Standards' was issued by the Standing Committee on Language Education and Research (SCHOLAR) in January, 2003. This particular document recommends setting up an incentive grant scheme to encourage practicing teachers to acquire further subject-related qualifications. Compared with the Language Benchmark

Policy unilaterally enforced by the Education and Manpower Bureau, which was viewed as being based upon the deficiency model of teaching, the SCOLAR document focuses on the continuing professional development of teachers. Overall, it appears as though the focus seems to be on the deficiencies of teachers and teaching methods as opposed to medium of instruction; criticism of Chinese medium of instruction prevails as parents, educators, and the business sector continue to resist the practice of mother-tongue education.

Without a strong language base, students have fewer chances of achievement, and ultimately, without a strong workforce, the economy of Hong Kong will eventually be impacted. As Hong Kong strives to find her place in this hyper-competitive global mark, she needs to focus on strategies that will banish the image of Hong Kong as a “little rickety boat with many holes in its hull” (Roche, *South China Morning Post*, January 13, 2003, p. A2). One of the greatest fears is that Hong Kong will no longer be the gateway into China and that it will eventually be bypassed completely. There are indications that the skill level in the mainland has been improving steadily, while all indications are that the English language levels in Hong Kong are seriously slipping as English proficiency has been seen as declining since the change of sovereignty (*South China Morning Post*, January, 23, 2003, p. 3). One business man writes in the editorial section of the *South China Post* that the English speaking skills of many mainlanders are very “impressive” (Granger, *South China Morning Post*, January, 8, 2003, p. 10). He states that over the course of 15 years, he has experienced a “phenomenal improvement in English language standards on the mainland, spoken and written by the people on the front line of China’s export drive” (p. 10). He states that many of his clients today simply “bypass the Hong Kong trade shows and go directly to the mainland…Hong Kong’s English standards seemed to be excellent in comparison to their northern counterpart. This is no longer the case. The gap between the two has narrowed to nil.…This is something an all-too-complacent SAR should take very serious note of” (p. 10).

5.11 Conclusion

There is no doubt that these are interesting and challenging times as Hong Kong struggles to find its autonomy in this very unique one country, two systems arrangement. The furor over Article 23 of the Basic Law, the interpretation of the Basic Law by the Standing Committee of the National people’s Congress, the bid for universal suffrage in 2007/2008, and the very heated debate over reclamation plans for Hong Kong’s Victoria Harbour are all but a few examples of the changes and challenges facing Hong Kong. Of course, amid all the furor, there is also humour; at the end of 2003, an article in the *South China Morning Post* listed the three most high-profile figures in Hong Kong: Winston Chu Ka-sun, the adviser to the Society for the Protection of the Harbour was listed as number three; Regina Ip Lau Suk-yee, the former secretary for security was listed as number two; and the most popular figure was the Yuen Long crocodile that has been living freely in the river in Yuen

Long, and who has evaded capture from some of the world's top crocodile catchers. Winston Chu Ka-sun responded by stating that "such a result was both amusing and a lesson in humility, to know that I had been defeated by a crocodile" (2004, *South China Morning Post*, A15). While these types of responses can provide relief and humour in these challenging times, it appears as though there will be little relief or humour for future students in Hong Kong until the policies concerning medium of instruction have been fully analyzed and addressed.

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Part II
Race, Gender, and Equity

Chapter 6
Race, Ethnicity and Gender in Swedish Education: Policy Discourses and Dangers

Gaby Weiner

6.1 Policy and Research Context

This chapter provides an overview, from the perspective of an outsider,[1] of the impact of Sweden's educational policy relating to equity issues, in particular gender and ethnicity, on what goes on in the nation's schools. The first part of the chapter provides the policy context in which decisions were made in Sweden after the Second World War that profoundly affected how educators dealt with the two, in some ways, parallel social factors of gender and ethnicity. The second and third parts provide an overview of educational developments and research in the specific fields of gender and ethnicity in Sweden. The final section brings together the arguments presented in the chapter, and speculates on the dangers to Sweden's 'branding' as strong on human rights and enlightened capitalism, if the rhetorical stance taken up by successive governments is not paralleled by a stronger commitment to changing practices at the school and community level.

Two considerations permeate this chapter. The first concerns how language reveals and acts on change in culture and ideology; and the second, how power is exercised in determining debates (and resources) about ethnicity and racism in Sweden. De los Reyes (2001) argues that in recent years, the concept of 'diversity' which suggests enrichment and celebration of difference, has entered Swedish working life, as a positive alternative to the 'problems' of discrimination, segregation et cetera. Moreover, as de los Reyes (2001) points out, diversity is not only about ethnicity:

> Other principles of social categorisation, such as class, gender, age and functional impairment, also feature in the discussion of diversity, although to a significant lesser extent (de los Reyes, 2001, p. 11).

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Why has the term 'diversitet' entered everyday language, and 'värdgrund' (values) become a key concept for educational policy-makers? The concept of discourse is useful in this context, as a means of understanding the ways in which different linguistic shifts parallel changes in policy and culture. It allows us to see that knowledge and understanding are continually changing, and that they are closely related to the social circumstances that frame people's existence. Thus, different sets of power-relations generate and are generated by linguistic and discursive shifts. So, changes in the usage of 'värdegrund' and 'diversity' may be interpreted as a retreat from the previous policy in Sweden, of treating each social category as separate, and as privileging social class and gender as key policy targets. In its place have come concepts that point to a widening and broadening of policy-making which embraces difference.

A second and related issue is how power is exercised in discussions of equity and värdegrund questions in schools and education more widely, and in whose interests equity policies are framed. It could be argued, for example, that many Swedish progressive political policies have been as much driven by economic as social or democratic concerns. Florin argues that unlike other countries, the Swedish solution to labour market shortage in the post World War II period drew both on discourses of women's emancipation and women's traditional roles as workers in Sweden:

> Swedish women were part of the labour force at an early date and since Sweden was mainly an agrarian country well into the 20th century, the working woman became the norm […] That more than half a million housewives were welcomed onto the labour market [in the 1960s], and stayed there, has its roots in our Nordic history. Germany handled it different. They had the same problem but imported foreign labour instead (Florin, quoted in Palm, 2002b, p. 5).

Not only that, the decision to bring women into the Swedish labour market was mirrored by the wish to keep immigrants out (Lundh, 1994). Thus, economic and social democratic interests coincided, as post-War War II politicians invested in child-care, health, education and care of the elderly as part of a strong welfare state, in order to release women from their traditional roles as care-givers in exchange for full integration into the labour market. However, in the end, relying exclusively on the pool of women's labour was insufficient. As Sweden transformed from a country of emigration to one of immigration post-1945, labour market shortages not met by women were resolved through the employment of economic migrants from abroad. Although the first restrictions on immigration came in the 1960s when there was a short downturn in the economy, it was not until the 1990s, that Sweden seriously re-instituted border controls in response to growing budgetary problems and high unemployment. As the economy picked up towards the close of the twentieth century, so immigration became necessary again. The response meant that Sweden was compelled to reconsider its self-image as one of the richest and most democratic countries in the world (Nygren, 1998).

Even as the welfare state has been subjected to tighter economic controls, Sweden's international reputation remains one of a unique combination of market economy and strong public sector. Thus Sweden is seen as 'one of the most comprehensive and generous systems of welfare provision in Europe and the world'

(Gould, 1996, p. 91). One aspect of this reputation is that Sweden has been identified as one of the best places in the world for women (Neft & Levine, 1997). Yet at the same time, minority groups often have more difficulties in Sweden than in other countries, particularly in employment, as a recent OECD report points out:

> The employment percentage differs for different nationalities. It is low among the large immigrant sections of the population who arrived at the end of the 1980s and during the 1990s. The latest immigration has largely concerned refugees and the reunification of family members, while immigration during the 1960s and 1970s was largely for employment reasons. Today the situation for foreign citizens in the employment market is considerably worse than during recent decades. … Among non-Nordic citizens, the ratio of those in employment has fallen from roughly two-thirds to about a third (OECD, 1998, p. 34).

From the 1980s onwards, neo-liberal influences became increasingly visible both inside and outside government. As Nygren points out, concepts like 'cost efficiency, privatisation, marketization and customer-orientation have been introduced and disseminated as ways of changing the production of welfare' (Nygren, 1998, p. 143). The notion of Sweden as an egalitarian society began to fracture as poverty re-emerged in the 1990s, particularly among the increasing numbers of older people and the 'new immigrants' from Southern Europe (Ekberg & Gustafsson, 1995). Thus conceptions of equity were forced to shift, from concentration on single categories (women, immigrants, unemployed, the poor,) to recognition of multiple factors in social and economic positioning.

So, while the remainder of this chapter addresses two categories of social policy-making, 'gender' and 'ethnicity', as separate and divided off from other social categories such as social class, dis/ability, sexuality et cetera as indeed do most researchers and policy-makers in Sweden, this splitting off is misleading. Individual categories may be bureaucratically and conceptually easier to handle, but they misrepresent the sum total of what it means to be a human being in today's Sweden.

6.2 Education and Gender in Sweden

A reading of gender politics during the post-war period is that Sweden was more influenced by so-called 'state feminism', that is, women-oriented policy-making originating from within the social democratic state, than by 1970s and 1980s women's liberation movements in the United States and Europe. In contrast to other western countries, women's issues in Sweden were taken up earlier – from the late 1950s onwards, and addressed through the political parties and democratic mechanisms of elected representation. At a time when there was a shortage of labour-power in Sweden, the requirement for women's entry into the labour market meant that policy emphasis was placed on women's responsibilities to/at work, their working hours and salaries, their 'double' workloads, and their need for day-care for their children (Eduards, 1997).

The promotion of gender equality by successive social democratic governments resulted in the achievement of levels of welfare state, child-care and maternity provision

that were unmatched, except perhaps in other Nordic countries (Neft & Levine, 1997; Palm, 2002a). Yet, Sweden cannot be said to be an 'equal' country in all respects. Aspects of discrimination and exclusion continue. For example, the labour market and business sector have seemed particularly resistant to change.

> It is true that opportunities have been created for men and women to reconcile working life and family life […] However, our labour market is sexually segregated and there are few female leaders in the Swedish business sector as compared with the rest of Europe' (Gonäs, quoted in Palm, 2002a, p. 3).

Gender policies in Sweden originally came from the state and were associated with social democratic policy-making and the status quo, rather than with radicalism and rebellion. Women politicians aimed to influence government from within – to achieve what Florin terms 'a bloodless revolution' (quoted in Palm, 2002b, p. 5). Thus we can see that Sweden's gender standpoint differs markedly from, say Britain (USA, France, Canada etc.), where feminist demands for greater equality between the sexes was an oppositional discourse, making fundamental and uncomfortable demands on the local and national state.

6.2.1 Understanding Jämställdhet

'Jämställdhet' is a uniquely Swedish concept and almost impossible to translate into another language. It first appeared in the political rhetoric of the 1970s when the term for equality, 'jämlikhet', was thought by state feminists to be too general a term for challenging and changing existing gender and power relations. Jämställdhet (meaning of equal standing) was used to symbolise what Hirdman (1988) terms a new 'gender contract', and was widely accepted, according to Florin and Nilsson (1998) because it allayed fears about extremism.

> It [jämställdhet] bridged class distinctions, sounded moderately harmless and functioned in the same way as the concept of the Swedish *folkhem*, the welfare state, had done in its day – disguising underlying conflicts so that they could be handled. It expressed no power relation and it was disembodied – it had no sexual undertones – the sexes were only supposed to be placed side by side as two abstract beings, symbols and ideal types. It is true that the concept had a visionary content, but it was a moderate vision. Furthermore, the concept embraced and affected both women and men – it was normative and educational – new demands were made on both sexes (Florin & Nilsson, 1998, pp. 13–14).

In policy documents, jämställdhet's principal goal was seen as ensuring that women and men should have equal rights, duties and possibilities to share power and responsibility. During the 1980s, it was used in a variety of contexts: relating to, for example, paid and unpaid work, trade union activity and other social structures and activities, including education (Regeringens proposition, 1987/88:105:3). In the 1990s, the concept of jämställdhet was extended to include violence against women (Regeringens proposition, 1990/91). Thus, the existence of rape and other forms of sexual abuse was used, for the first time, as an indication of sex-*in*equality or '*o*jämställdhet'. As a consequence, issues of sexual abuse were made compulsory

elements of professional courses in health care, law, social work and teacher education.

Emphasis of jämställdhet was also extended to individuals' rights, responsibilities and possibilities across all areas of life (Regeringens proposition, 1993/94:147:15). As Berge (Weiner & Berge, 2001) points out, however, 'all areas' is all-embracing yet highlights nothing particular. In its current expanded and diluted form, it seems more difficult than ever for specific aspects of jämställdhet to be taken up and acted upon. Thus, a recent observation on how teachers and students view jämställdhet, suggests that it is often considered a rather 'toothless' policy goal.

> My experience (and I suppose it is the same for many Swedish teachers) of jämställdhet work in schools is of jämställdhet action plans to be written and jämställdhet days where someone - probably a headmaster or a jämställdhet representative – wants us to 'looks good'. And then everyone, I believe, talks about this type of work as boring and taking too much time out of 'real' schoolwork (informal written comment on an earlier draft of this paper).

6.2.2 Gender Patterns in Education in Sweden

Despite promotion of gender equality and jämställdhet, there seems currently to be much similarity between Sweden and other advanced western democracies. For example, as in other countries, Swedish women's hourly pay remains on average 80% of men's, women do most of all housework (82%) and only 20% of fathers take paternity leave (Ministry of Labour, 2000).

In terms of education, substantial gender differences are to be found. For example, the subjects and programmes chosen by students at the gymnasium (post 16) differ substantially in terms of gender:

> With regard to fields of study, there are great gender differences that clearly follow the usual pattern, namely a high percentage of men in technical and engineering sciences, and a high percentage of women in the educational and health-care sectors. (Statistics Sweden, 2000, p. 4).

Like many other countries, Swedish girls gain higher overall grades than boys in examinations at 16 plus, and at 18 plus, with 88% of girls compared to 79% of boys eligible to enter higher education. Yet girls tend to trail boys in science and technology (Öhrn, 2002). Even so, there is little evidence of a 'moral panic' surrounding the so-called failure of boys like that in Britain, since it is recognised that boys and young men do better in the Swedish labour market despite their lower examination results. In terms of higher education, the proportion of women gaining degrees is highest in healthcare (88%) and in teaching (80%) whereas men excel in technology (77%). Proportions are more or less even in other fields such as agriculture and forestry, medicine and dentistry, law and social science. However gender differences re-emerge at postgraduate levels with more males engaged in research and doctoral studies, and with 88% professors male as opposed to 12% female (Högskoleverket, 1999, 2001).

What of gender patterns in the classroom? In fact, there has been comparatively little Swedish research on classroom gender relations and practices, so change is

difficult to discern and map. There was an increase in research on boys and men in the 1980s and 1990s, which tended to identify boys more than girls, as influenced by their social class origins. Thus, particularly if they were from immigrant, minority and/or working-class backgrounds, boys and young men were seen as having been deeply affected by de-industrialisation and the loss of traditional male jobs (Öhrn, 2002).

Gender research on Swedish classrooms has tended to reflect patterns found in other Western countries. For example, in Wernersson's, 1977 study of 57 lessons, boys were found to substantially dominate classroom space and teacher time. Other studies show middle-class students and boys as more vocal in the classroom than both working-class students and girls; girls being treated by teachers as younger than boys, and boys, as more interesting than girls. Girls have been found to be more interested in 'work' and boys more interested in 'play', boys were observed using a range of techniques to intimidate and bully girls, and so on (referred to, in Öhrn, 2002).

There is some evidence, however, that such gender patterns in Swedish classrooms as described above may be changing. In particular, working-class girls now seem better able than their male peers, to work together and where necessary, to challenge and confront the power of the teacher (and the boys). Working-class boys, in contrast, seem less able to strategise effectively even though they appear aware that they need to succeed educationally (Öhrn, 1997). Thus the encounter of class and gender (and ethnicity) seems to be played out in schools in different ways in Sweden depending on culture, context and school milieu.

Finally, an action research study in northern Sweden links teacher development to gender change (Berge & Vé, 2000). It involved case studies of teachers' sustained attempts to change their own and their pupils' gendered practices. Of particular significance is the identification of 'moments of equity' where progress towards equity goals is being made, and 'moments of normalisation' where things seem to be going backwards and reverting to the conventional and 'normal' (Berge & Vé, 2000). This suggests that if schools and policy-makers fail to keep up the momentum on gender issues, conventional norms in terms of male and female behaviours and attitudes have the tendency to reappear and re-embed themselves in new generations of young people.

So, it can be seen that though there has been some important research on gender patterns and relations in Swedish schools and classrooms, there is little evidence to suggest that state policies or jämställdhet have had a particularly significant impact on what goes on in schools.

6.3 Education and Ethnicity in Sweden

Sweden has long been a multiethnic society despite the presumption in the 1960s of 'one language, one race and no religion' (quoted in Andrae-Telin & Elgqvist-Saltzman, 1987, p. 4). For example, there are four named Swedish-born minorities;

Sami, Finnish Swedes, Roma and Jews – each of which has made significant contributions to Swedish society and culture. Currently, of Sweden's nine million inhabitants, approximately 10% (over 900,000) were born abroad. Of these, 40% have lived in Sweden for 20 years or more. An additional 700,000 have at least one parent from abroad. Currently, a quarter of children in Sweden have at least one parent with a foreign background, and it is calculated that by the end of 2010, it will rise to a third (Regeringens proposition, 1998/99:143).

To understand how Sweden has dealt with this rapid diversification of population, it is necessary to refer to its history of peaceful coexistence, going back nearly 200 years. Sweden was a powerful Nordic imperial power from the seventeenth until the early twentieth century, when its empire came to an end with the granting of independence to Norway in 1905. Sweden's espousal of neutrality from then onwards meant that it was able to avoid the worst excesses of the two twentieth century world wars. Sweden was thus able to contribute to, and benefit from, the reconstruction of Europe in the immediate post-war period, and consequently, achieve a higher living standard earlier than other European countries. There was also little challenge or disruption to the pockets of Nazism and Fascism that developed in Sweden in the 1930s, as in other countries (Kaplan, 2001). Moreover, those growing up after 1945 prospered from an advanced welfare state, social cohesion and a level of prosperity which attracted the admiration of the rest of the world, even as Sweden's shady compromises with Nazi Germany were forgotten.

Sweden was shielded during the 1950s, 1960s and 1970s from self-scrutiny regarding racism facing many European countries. Discrimination such as that against African-Americans in the United States of America or that of the apartheid system in South Africa seemed remote; the fight against racism was mainly international, not national. Certainly, Sweden had its share of right-wing extremist and nationalist groups but they were not visibly influential. There were no immigration controls until 1967, at the start of a downturn in the economy when need for foreign labour power decreased. In the 1970s, as the economy shifted yet again, economic migrants came from neighbouring Nordic countries with 44% of Finnish origin (and white). In the 1980s and 1990s, however, new migrants appeared, largely refugees and asylum seekers from Eastern Europe and the developing world, many of whom were people of colour (Kaplan, 2001).

One consequence of this change in immigration patterns was a heightened visibility of racist groups opposed to what became known as the 'new' Swedes. For example, in the 1980s, Bevara Sverige Svenskt (BSS), the first known, active neo-nazi group coordinated the burning of crosses in different parts of the country. Several other small extreme-right political parties also came into existence from the mid-1980s onwards, such as, Sverigedemokraktaterna, Sjöbopartiet, Framstegspartiet, and Ny Demokrati. Consequently, racism became of national concern for the first time in the post-war period (Lange et al., 1997).

Yet, there was little concerted action in response to requests from municipalities, schools and trade unions for guidance, advice and support, on how to fight racism, despite some piecemeal interventions e.g. small action research projects supported by Skolverket. The responses to social and ethnic changes in Sweden seem to have

been overly-cautious and hesitant. Already by the 1960s, it was acknowledged that some children (mainly of Finnish origin) had Swedish as their second language and that teachers needed extra support to help these students achieve the required levels in school examinations. A major investigation on immigration took place between 1968 and 1974 aimed at mapping out the situation of immigrants and suggesting strategies for the future. The main report of the investigation formed the basis for policy on immigration in Sweden. For example, in 1975, immigrants were granted equal rights and freedom of choice with Swedish citizens (Regeringens proposition, 1975:26). In the 1980s, the focus moved to fostering understanding of different cultures and practices in order to create a more harmonious society (Lahdenperä, 1996).

Progress has been particularly slow in research compared with policy formulation. Lahdenperä (2000) suggests that one reason for this is that immigrants and minorities have been the targets, rather than the informants, of policy. Acknowledgement eventually came in 1994, that the educational achievements of children from minority backgrounds might be affected by racism and prejudice, as well as by language and other cultural factors. Thus, the 1994 Läroplan stated: 'Xenophobia and intolerance must be met with knowledge, open discussion and active commitment' (Lpo 94: 5, translated from Swedish).

Simultaneously, however, the traditions and religions of 'others' were subordinated to 'Christian traditions and Western humanism', which were put forward as a basis for children's induction into 'human rights, generosity, tolerance and responsibility' (p. 5) – though this phrase was later removed (Lpo, 98). By the late 1990s, government policy moved away from assimilation towards a form of mutuality and acceptance of diversity. For example, in a 1997 government bill, it was stated that different cultural groups should complement each other, bringing together skills and experiences that would contribute to the realization of the potential promised by multiple perspectives (Regeringens proposition, 1997/8:16). At the same time, institutions such as schools were requested to change their organization and practice to reflect Sweden's ethnically diverse society.

From the 1990s onwards, the above and other official documents offered clear indications to teachers and schools that multiculturalism/interculturalism was an issue that needed to be addressed. However, there was little practical advice on how they should go about it. Also, while statistical information and fact-gathering on minorities provide information about where 'new' Swedes live, the forms of work they do, what they are paid and their educational levels etc., there was and still is no systematic means of gathering or distributing information and research on racist incidents and how to deal with them. This has led, according to the government department responsible (Integrationsverket, 2001), to a general lack of knowledge about the nature of racism, how it is characterised, or what motivates perpetrators.

Following this knowledge vacuum, 'common-sense' assumptions prevail. According to a 2001 survey of 1,000 Swedes 15 years of age and above, 48% of respondents believe in the existence of distinctive human races, each of which can be differentiated according to skin colour, culture and religion, and also, in some cases, by personality, looks, temperament and treatment of women. A larger study

focused on the incidence of racism, and attitudes towards democracy, of nearly 8,000 school students (between 6th and 9th grade). The study found that 3% (233) of the students had, during the previous 12 months, been exposed at least once to a violent, racist, ethnic or politically-related incident; 7% had suffered from verbal threats; and 13% reported unfair treatment because of their minority ethnicity. Racist or ethnic abuse had been experienced by 23% of the students, while 17% had been contacted by racist organisations and 11% admitted to reading racist magazines at least once. The study also showed high levels of 'conscious' racism; for example, 11% thought 'rasblandning' (racial integration) against the laws of nature, 12% expressed the view that Jews have too much influence in the world today, and 29% claimed that there is too much emphasis in Sweden on the evils of Nazism and the Holocaust. Even more disturbing, over a third (34%) agreed or partly agreed with the statement that non-European immigrants should return home (Lange et al., 1997).

Racist beliefs thus underpin the values of a significant minority of young people in Sweden, despite the public outpourings of concern about racism, and despite the fact that several antiracist campaigns targeted schools and young people. For example, in 1992, a number of government agencies were jointly given the task of trying to influence young people's perspectives on, and behaviour towards, immigration, immigrants and ethnic minority groups. They came to the conclusion that it is difficult to change perspectives by information alone – an appeal to values and feelings is also important. This point has been taken up in recent government emphases on värdegrund (values) among schools students, and indeed has led to the establishment in 2001 of a National Values Centre (värdegrund centrum) at Umeå University. But so far this work is at the stage of fact-gathering and mapping rather than intervention or practice.

Another strategy has been to develop government action plans outlining what has been achieved so far, and what needs to be done, in the fight against racism and xenophobia. Schools are described as important institutions for getting into touch with young people with unique possibilities to create among young people an understanding of democracy and respect for human dignity (Regeringens skrivelse, 2000/01:59; Skolverket, 2000). Likewise, as we have seen, various regulatory frameworks for schools and the curriculum (e.g. Lpo, 1994; Lpfö, 98) require that schools incorporate issues of democracy, respect, tolerance and equality in their work. Yet there are few suggestions about how these changes of attitude may be achieved in practice. As a consequence, teachers disregard cultural differences when trying to counteract social differences. In her research on multicultural classrooms in Sweden, for example, Ann Runfors (1997) found that instead of welcoming and embracing diversity, teachers aim for social sameness, as defined by the majority:

> One of the few studies involving how teachers can intervene in supporting minority students with educational difficulties, was carried out by Lahdenperä in 1997. She found that one of the main problems was that teachers saw such students as individual carriers of difficulties rather than such difficulties arising from their environment or from the school itself (Lahdenperä, 1997).

6.3.1 Everyday Racism

While serious incidences of racism attract attention from the press, there is little interest in more routine and less severe forms of racism, which nevertheless provide a continual reminder to minorities that they are 'different' and unwelcome. A recent study of young people between 14 and 30 years of age, from 19 different ethnic backgrounds, both minority and majority, shows that many minority young people in Sweden experience ill-treatment and racism on a regular basis; moreover, that this ill-treatment has a profound impact on their everyday lives (Hällgren, 2002). Among the themes that emerged from their often quite similar stories, are the steady 'drip, drip, drip' of racism and abuse, the consequent need to be 'watchful' at all times, and of disappointment in adults, particularly police and teachers.

Thus, the happenings that routinely affected these young people include: being the only one among a group of 'Swedish' friends to be picked up and questioned by the police, people being unwilling to sit next to them on the bus, being asked offensive questions about the colour of their skin, being the butt of racist jokes, and so on. Racism is described as something 'you can't touch', 'you can't put your finger on', but that 'you can feel', even if it is 'unspoken'. 'Otherness' is experienced as a feeling of worthlessness, of being found guilty in advance. One aspect of 'not belonging' is the need to be alert and 'on the edge', ready to take up a defensive position at a moment's notice. These young people expressed disappointment with the adults in their lives for not taking a sufficient stand against racism and prejudice, and gave few examples of adults taking up issues on their behalf, in or outside of school (Hällgren, 2002).

What is clear from this and other research is how unprepared teachers and institutions are for the 'new' Swedes as they are called, and the lack of understanding of, or challenge to, outdated conceptions of what constitutes the Swedish 'folk'(Korsgaard, 2002). The difficult relationship between Swedish policy-making and practice in schools is usefully summarised in a recent research study:

> One conclusion of my studies is that it is also reasonable to ask whether it is possible to combine Riksdag [parliamentary] resolutions on intercultural perspectives in all teaching with management by objectives and local interpretation of curricula, that is to say, whether the goal can be distinguished from the way to do it. (Ekland, 2003: 1)

6.4 Evaluation

In this chapter, we have seen that Swedish policy on gender and ethnicity in the post World War II period was driven as much by economic as social or welfare considerations. Much policy-making on both issues originated in labour shortage, and the consequent need to attract groups other than Swedish men, into the labour market. Education was not identified especially as a vehicle to promote these changes, and indeed in both areas, educational research and practice lagged behind other policy fields. While in the past gender has been prioritised over ethnic difference, recent

labour shortages, liberal policies on asylum seekers, and policies of dispersing immigrants across the country, have led to the perception and reality of a rapidly diversifying society. Cracks have begun to appear in the apparent harmony between different cultural groups. At the same time the gap has widened between the rich and the poor.

It is argued that approaches to social and cultural difference draw on conceptions of national identity and value-frameworks, on the one hand, and wider, more global structures and understandings, on the other. In recent years, the Swedish state ceded power and responsibility to local municipalities and the individual, yet simultaneously has sought to impose control over the values and behaviour of individual citizens. This is not due merely to ethical considerations or concerns about social order. It is also an acknowledgement of the importance of the reputation (or 'branding') of Sweden at a time of heightened global competition. The perception of Sweden of outsiders such as myself is initially as:

- An advanced capitalist state
- Advanced, networked knowledge society
- High investment in welfare
- Imbued with human rights and gender equality
- Protective of the environment
- Commitment to the arts and design

This is the image of Sweden that others see; an image, it is suggested, which is in danger if there is a failure to resolve the struggles around diversity, difference and racism. The cultural (and economic) capital achieved from Sweden's advanced policies on women (even though they may not be realised through education) is currently under threat from Sweden's inability to come to terms with itself as a country of multiple-cultural forms and perspectives.

6.5 Conclusion

One of the problems with centralising values at the same time as devolving power and responsibility is the consequent prioritisation of rhetoric over strategies aimed at change. In some ways, rhetoric provides an obstacle to reflective and conscious change, say on the part of teachers, because the fear of being thought of as racist or sexist, denies them a secure environment in which they can open-up about their inadequacies and difficulties. A more conscious and deliberate means needs to be found which enables teachers (and other practitioners and policy-makers) to reflect on their everyday practice in order to change it. If this is not made possible, for instance through systematic professional development or action/teacher research, the threat of publicly expressed dissatisfaction and disorder may well undermine Sweden's international reputation as one of the 'good guys' of the international community. This may have economic as well as social repercussions. It is a scenario which Sweden would do well to avoid.

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Chapter 7
The Gender Agenda: The Limits and Possibilities of Global and National Citizenship Education

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7.1 Current Issues in Gender Equality and the Development of Nation-State Citizenship Education

The chapter discusses citizenship education and gender issues. The chapter explores the English/Welsh model of citizenship education, which is contrasted with global citizenship education, gendered formulations of active citizenship. The chapter suggests various policy strategies for overcoming cultural, economic and political marginalisation of women and implications for gender equality globally.

In this chapter we have joined forces to consider the possibility of national and global citizenship education promoting gender equality. Whilst one of us has focused her research on global education and global citizenship education (Marshall, 2005) the other has been working on the gender dimensions of the English and Welsh citizenship education initiatives in the European context (see Arnot et al., 1996 and 2000). Here we challenge contemporary gendered formulations of citizenship and indicate how citizenship educational programmes, whether national or local, can contribute to or overcome the economic and political marginalisation of women.

Despite the international women's movement, the relationship of women to global citizenship is highly problematic. Conflicting representations sustain this position rather than resolve it. We focus on two very different educational spaces – we first explore the space represented by a highly conceptualised, somewhat modernist English/Welsh model of citizenship education with its token reference to 'the global' so as to elicit some of the gendered aspects of the concept of citizenship found in European contexts. We then explore the fluid, amorphous and somewhat disputed field of global citizenship education that offers limited official endorsement of the notion of gender. We argue that the two traditions, whilst very different and each problematic, have much to contribute to the promotion of gender equality globally.

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We begin by considering the problems for gender equality associated with the development of nation-state citizenship education using the recently established English and Welsh programme as an example of the gender tensions underlying the concept of citizenship – of especial note here is the divorce of the public and private spheres and its consequences for the inclusion of women and 'the personal' within the political sphere. We highlight the feminist critique of liberal and civic republican notions of national citizenship. If global citizenship education is to develop in ways that support gender equality, careful consideration of citizenship as a concept is also vital. In the second part of the chapter we consider the extent to which global citizenship education has developed and the recognition given the extensive gender issues associated with globalisation. This is the first attempt to combine the two analyses. Global citizenship education, if it does develop, could usefully take some lessons about gender issues from feminist challenges to citizenship education in the UK and elsewhere (Stromquist, 2004).

The transformation of human rights from a feminist perspective is crucial to addressing global challenges to human rights in the twenty-first century. This should be seen in the context of the growth and evolution of women's movements internationally in the past 2 decades. Women are taking leading roles in redefining social concepts and global policy issues in areas such as development, democracy, human rights, world security, and the environment. This means not just looking at what have been called 'women's issues' – a ghetto, or separate sphere that remains on the margins of society – but rather moving women from the margins to the center by questioning the most fundamental concepts of our social order so that they take better account of women's lives. (Bunch, 1995, p. 11).

Education systems, as we know, play a crucial role in the formation of citizens in a national context and are increasingly being called upon to address global citizenship agendas. As international agencies and world funding agencies are now aware, female access to education globally is central to the project of social progress. However, the 'rights of access to education' is not sufficient to meet feminist egalitarian goals. Even though gender equality is one of the great democratic principles, we shall argue that the model of democratic citizenship on which educational systems are built often excludes gender concerns. All too often discussions of citizenship are abstracted from real social (gender and power) relations and little attention is paid to the gendered nature of citizenship ideals. Feminist educationalists, therefore, have sought in many different ways to redefine what is meant by 'democratic' exploring and exposing in particular the limitations of liberal democratic educational traditions and its sometimes negative consequences for women. Democratic education from a feminist perspective involves at a far deeper level a challenge to the social conditions that have sustained women's second-class citizenship and their experiences of poverty, violence, harassment, and economic exploitation.

These debates have moved into new political spaces – significantly they can now be found in the context of discussions about the nature of citizenship education – a subject that appears to have increased importance as a mechanism for sustaining nation-state identities as well as global economic development (Heater, 2004).

Many nation states are currently considering the role of education in the creation of citizens in the twenty-first century (Cogan & Derricott, 2000). In response new centres for civic education have been set up; there is for example, an Asian network of civic education, Commonwealth countries are being encouraged to consider citizenship education and the Council of Europe suggests it is time to consider what values and skills individuals will require in the twenty-first century (ibid). There is also now greater interest in thinking about what would constitute global citizenship education (or cosmopolitan/multiple citizenships), although this is not without its contradictions given the association within liberal democracy, of citizenship with the nation state (Heater, 2004).

Concepts of citizenship, by definition, are based on a concept of belonging that is fundamentally exclusionary. Minority ethnic groups, refugees and asylum seekers, the disadvantaged and those with disabilities often find that not only does the concept of citizenship fail to include them but that, even more importantly, their marginality is reproduced through such dominant discourses. Abstract notions of the citizen can divert attention away from egalitarian politics and identity formation. If governments are not alert, citizenship education becomes the political device with which to mask the stratificational and destructive effects of performance and managerialist cultures in schools. It represents an attempt arguably, in Durkheimian terms, to counter the anomie, or the normlessness of a globalised economy by recreating the bonds of social solidarity. Through this regulative and integrative work, citizenship education can perform the task of masking the differentiations and hierarchical values of society within notions of the 'common good'.

7.2 English and Welsh Citizenship Educational Initiatives

Citizenship is a hotly contested subject. A prime example of the nature of this contestation is the recently introduced English and Welsh citizenship education that represents approximately 5% of the compulsory curriculum. The new curriculum represents the tensions between a civic republican model of the 'active' participating citizen and the liberal model of the 'good citizen' (Arnot, 2004). The aim of the new curricular initiative introduced into all secondary schools in England and Wales in 2002 was signalled as 'no less than a change in the political culture of this country both nationally and locally' (Advisory Group on Citizenship (The Crick Report), 1998, p. 7). However, paradoxically the compromise between civic republicanism and liberal democracy appears to have had the effect of marginalising, if not removing, egalitarian concerns more generally. The concept of social 'equality', although initially included in the guidance to schools (QCA, 2000), does not appear to be even mentioned in recent documentation. Garmarnikow and Green (1999) suggest that what appears to have disappeared in this example of Third Way politics with its emphasis on social capital and neo-liberalism is the social democratic agenda put forward in the post-war period and 'any notion of serious struggle for rights in relation to both the state and other structures of power; citizenship as

changing relations of power; and citizenship as fundamentally compromised by systemic, structured inequalities' (p. 120). The concepts of the 'empowered' or the 'educated' citizen replaced or displaced any central social justice concerns. Citizens, rather than the state, therefore are called upon to take responsibility for economic renewal and for building social cohesion. Thus, these seemingly liberal progressive tendencies could sustain rather than challenge globalised and dehumanising economies and 'polarising social inequalities' (p. 121) in ways that, paradoxically, could even lead to authoritarian populism.

Of concern particularly to those wishing to promote gender equality is the failure of the new curriculum for citizenship education to even attempt to transform the gendered basis of contemporary political culture. Despite being integral to the teaching of human rights, the citizenship education programme itself remained strangely silent about issues of gender (Arnot, 2004). The new body of political educators appear to have been negligent by not engaging with a major body of Western political thought – feminist political theory; and feminist educationalists seem to have lost an important opportunity to achieve national recognition for gender equality as a guiding principle of citizenship education. As a result, by educating the nation's children along the lines suggested in this subject, the next generation are likely to confirm women's position in the 'ontological basement' (Roland Martin, 1994) in which women, children and the family live 'outside and underneath the political structure' (p. 107).

The failure to address feminist concerns about women's marginalisation from political decision making and exclusion from power structures could have been anticipated given the underlying gender assumptions of both civic republicanism and liberalism as political philosophies. The historical failure of civic republicanism to include, in any substantial way, civic society and the quality of life, even references to the family and the labour market, meant that it was not likely to recognise gender relations in anything other than the public/political sphere. As Heater (2004) points out, feminist support for civic republicanism was difficult given the tendency to elitism implied by the high level of civic participation required in formal politics. On the whole, this framework models the citizen on the role of men in formal politics, and describes civic virtues in terms of male military valour and political activism. If being a citizen and doing the practice of citizenship has been assumed to be 'a uniquely male function' (Turner, 2001) that is framed by male narratives of nationalism and/or militarism, then women will be excluded from participation in nation-building.

This separation of public and private sphere and the masculine associations of citizenship is also central to democratic liberalism – another powerful Western European tradition. As Carol Pateman (1989) has so adeptly analysed, the form of social contract, which was defined as the basis of liberal democratic philosophy, was constructed over and above the alleged 'disorder of women' implied by their inferred emotionality, subjectivity and closeness to nature. Associated with the social contract was a second exploitative contract – what she called the *sexual contract*. Whilst the social contract formed the basis of a *brotherhood of man,* a political fraternity that controlled the political order, the sexual contract assigned men the

right to women through marriage and control over the household. Such a philosophy, whilst signalling the centrality of citizen rights, nevertheless constructed marriage and motherhood outside of the sphere of such rights and hence of citizenship. Women were allocated second-class citizenship – their entry into the public civic world would only be achieved through the massive disruption of this public-private division. The conditions for women's inclusion in liberal democratic notions of citizenship therefore were their subordination to men in both public and private spheres and their exclusion from the public sphere.

With these gendered philosophical underpinnings, the silence about gender relations in the new English Citizenship curriculum is not surprising. References to gender are well hidden in a text which employs the language of 'discrimination', 'human rights' and 'equal opportunities' without any specific reference to the under-representation of women in public life, the need to encourage female leaders, the importance of women's engagement in civic decision-making or the encouragement of men's civic duties in relation to private life and fatherhood. There is a silence about the importance of challenging a historical legacy that has marginalised the sphere of everyday family life (and indeed of motherhood and female virtues) from discussions about rights, duties, justice and freedom. De facto, the main focus of the curriculum subject is the male centred public sphere. Without specific advice to schools to address such gendered biases, it is likely that women's historic struggle for citizenship will be assumed to have been resolved with female suffrage and contemporary languages of citizenship with their strong gendered representations of male and female citizens will be left unchallenged (see Arnot, 2004).

It is not without significance that in a study of 300 student teachers in Greece, Spain, Portugal and England and Wales, strong forms of civic republicanism were identifiable in countries that had experienced dictatorship and which have set up focused civic education programmes in schools (Arnot et al., 1996, 2000). In these countries, student teachers were found to support notions of a citizen's duty to encourage democracy over and above the action of the state. However, the strong discourse of duty tended to be used mainly by male teachers in the sample. Women appeared neither to use the discourses of civic republicanism nor to find a position for themselves in it. Female teachers in all national samples were more likely to employ the *Judaeo-Christian* discourses of morality emphasising the ethics of care and community involvement or contemporary *egalitarian* discourses around state provided social rights and social justice. The 'good citizen' was represented by the grandmother, the mother, or the carer in the private sphere rather than the civic leader, representative or voter.

The qualitative data generated in this project suggested that the dominance of men in the public sphere was central to the view of citizenship held by both male and female student teachers in each of the countries involved. It seemed hard to conjure up any positive involvement of women within the public sphere. For example, over 62% of these student teachers in the UK sample selected the word 'competitive' and 51% chose the image of 'powerful' to describe men in public life whilst 34% of student teachers described women as 'efficient', 27% as 'competitive' and 25% as 'independent' rather than powerful. Men were perceived to have

most control over policy decisions and public appointments and an especially strong influence over economic and foreign policy. Women, on the whole, were perceived to have negligible influence on policy and influencing public appointments. Gender and generational differences were noticeable in the UK although it seemed that young student teachers were less likely than their college lecturers to see it as important that women should occupy public positions.

This association of public /private with the sexual division of labour was also carried through to the representations of men and women in the private sphere. The images of women in private and domestic life were strong ('caring' and 'efficient') whilst those for men were absent or, if present, rather negative. Forty-three percent of the sample of English and Welsh student teachers described men in private life as 'disorganised', 'hesitant' (31%) and 'dependent' (18%) in domestic life. This absence of a collective representation of women in public civic sphere and of men in the private sphere, if left unchallenged, could have major implications for the education of girls/boys especially in relation to their adult lives and their future role as citizens (Arnot et al., 1996, 2000).

Particularly relevant to this analysis is that even in countries with strong civic education programmes, there was little evidence that new generation of teachers felt that the masculinisation of public life and citizenship could be changed through political action. The source of male power in the public realm was partially taken for granted despite a strong awareness of sex discrimination. Male student teachers in the different European countries appeared to collude with differentiated gender roles and expressed little personal commitment to challenge masculine associations surrounding the public realm. There was a seeming naturalness of male power based on gender role difference. The juxtaposition of power and femininity represented by women in public life disturbed traditional notions of femininity and was expressed as a kind of corruption in which women, in public life were either over assertive (autocrats) or sexually predatory. There also appeared in some instances to be deep anxiety amongst men about their loss of control over the public sphere, which led to polarised constructs of femininity. In other words women were not represented as legitimately successful and autonomous in public life.

The absence or marginalisation of the private sphere from definitions of citizenship is linked to deeper associations about the relationship between rationality and citizenship with the resulting exclusion of 'the affective domain' (Nussbaum & Glover, 1995) – the field of personal/emotional relationships – from civic discourse. The focus on rationality as the basis of civic life can result in the failure to value 'the caring ethos' and maternal values (Noddings, 1988) found in the private and familial sphere that might provide alternative models of citizenship and civic virtues. Thus whilst the principle of excluding private sphere from state control, surveillance and intervention appears beneficial especially to women within the family, it has the disadvantageous effect of marginalising and discursively subordinating women as non-rational beings and of reducing the potential impact of other sets of civic virtues from a discussion of citizenship education. Further, the neglect of the affective domain has major consequences for the education of children in their entitlements and rights in their personal lives.

These conceptualisations of citizenship that are much debated in the English context suggest that citizenship education has to be carefully thought through if it is to engage with contemporary social change. The late Sue Lees (2000), for example, indicated how the contemporary citizenship education programme, by excluding the 'personal from the political' fails to recognise complex changes in gender relations in the private sphere – for example, the uncoupling of women from traditional family structures and a search for alternative sexualities and life styles, the rise in illegitimate children, single parenting and divorce rates. At the same time the normative in relation to marriage is problematic, not least because of its confusions and obfuscations. In the English citizenship curriculum, schools are expected to engage with the diversity of moral values but at the same time support family and marriage (QCA, 2000, p. 195). There are only passing references to the need for young people to be taught about changes in personal relationships – 'about the impact of separation, divorce and bereavement on families' (ibid, p. 193). Such change in gender relations should surely be central to the citizenship education project.

In reality, good citizenship is often premised upon heterosexual (married) nuclear families (Richardson, 1998). As a result, lesbian and gay youth are likely to be negatively affected by such programmes. The restraints on teachers that prevent the schools promoting alternative life-styles, is symptomatic of the intolerance of sexual diversity in society. Tolerance of gay and lesbian groups is only on the condition that they remain within the boundaries defined by society. Young people in schools have little chance of considering the ways in which lesbians and gay men are often excluded from civil, political and social rights, left unprotected from discrimination and harassment on grounds of sexuality by the law and the police, and experience prejudicial treatm-ent in relation to social rights of welfare. Lesbian and gay men can thus be 'dehumanised' by a 'disembodied' concept of citizenship (ibid). The conventional view of citizenship reproduced within citizenship education tends not to challenge such discriminatory social patterns.

Even when citizenship education is closely tied into personal, social and health education, contemporary shifts in gendered power relations can be underplayed. In the English example, adolescents are to be taught to be 'aware of exploitation in relationships'. The failure to interconnect sexuality education and citizenship education (despite the latter's recognition of the importance of civic dimensions in personal and social education) means that young people are not encouraged to develop, in the context of civic rights:

> an understanding of their sexuality, the choices that flow from it and the knowledge, understanding and power to make those choices positive, responsible and informed' (Hanson & Patrick, 1995, quoted in Lees, 2000, p. 262).

Citizenship education in the broad sense could become an invaluable space in which young men and women are taught about the way sexual identities today are constructed and how they shape sexual behaviour/orientation. The rights to know about such things should be just as important as the mechanics of contraceptive devices. The institutional and cultural constraints, which shape sexual identities and the role of sexual performance in relation to normative notions of compulsory

heterosexuality, could be addressed. With this sort of education, the ‘issues of responsibility and moral choice’ could be related not just to political and economic rights but to questions of sexual power relations, and to the different forms of male and female moral reasoning, and conflicting male and female responsibilities in society.

What this analysis has demonstrated is how the breaking of traditional gender boundaries within nation states in the late twentieth century highlights substantial new needs in relation to the education of citizens. Schools are being urged to prepare the next generation for social and moral flux and significant gender changes. Increasingly the focus is not just on national gender structures but global patterns of gender. In this context, there are conflicting representations of gender in relation to globalisation and development, human rights, and education. The issue for those concerned with global citizenship education – as an emergent pedagogic initiative – is to take account of such feminist critiques.

7.3 Gender and the Global Citizenship Education Agenda: Unexplored Terrain

Over the last few years contemporary debates about the value and meaning of a global perspective in citizenship education have been vibrant (Cogan & Derricott, 2000; Heater, 2004; Osler & Vincent, 2002), and there have been calls for global citizenship education for the twenty-first century from a variety of different sources. However, like the development of English citizenship education, there has been only limited recognition of the gender significance of either global citizenship or even the effects of the global dimension on women. Here the tensions between liberalism and civic republicanism are not so clear cut. They take different form in the debates concerning the mean of global citizenship education.

It is interesting to note that, although the concept of ‘world’ or ‘global citizenship’ has a long history dating back to the Stoics (Heater, 2004; Nussbaum, 2002), the notion of ‘*global citizenship education’* is relatively new in the UK where current trends can be traced back to the initiative of the Council for Education in World Citizenship (CEWC 1939–2000). The terms ‘education for world citizenship’, ‘education for international understanding’ and ‘global education’ were used in the second half of the twentieth century when global education teaching was understood to be the means ‘to ameliorate the world’s troubles by cultivating in the younger generation an understanding… taken to mean both comprehension and empathy’. The discursive framing of ‘global citizenship education’ is more recent and is, not surprisingly, weak. Moreover there is persistent concern that the concept of the global citizen is not only disputed but may also have negligible political meaning (Heater, 2004).

Global citizenship education has been associated with complicated changing global climates and discourses. On the one hand, there are new global policies such as the UN Millennium Development Goals requiring increased international

collaboration; on the other hand grassroots counter-movements against economic globalisation call into question the concept of global citizenship. Within the movement for global education a global citizen has been defined as someone who… 'is aware of the wider world and has a sense of their own role as a world citizen; respects and values diversity; is willing to act to make the world a more equitable and sustainable place; takes responsibility for their actions' (Oxfam, 2000, p. 2). Such discussions are more likely to be framed within a liberal, individualist and often colonial global human rights model, in contrast to the civic republican, active but state-bounded model. This has led some commentators to consider the need for discussion about the existence of multiple citizenships (Delanty, 2000) or cosmopolitan citizenship (Nussbaum, 2002) accompanied by a sense of 'global civic virtue' or 'civic cosmopolitanism' (Delanty, 2000; Heater, 2002) which acknowledges both cosmopolitan or communitarian models of citizenship.

The movement for global citizenship education in schools is active, if somewhat uncertain. In the UK it is offered only cursory support by new citizenship education for secondary schools in England and Wales discussed earlier. The reference to 'the global' within the official English and Welsh Citizenship Curriculum is minimal. Less than ten per cent of the issues covered in the programme of study for 12–16 year olds (Key Stages 3 and 4) are devoted to the following aims:

> Pupils should be taught about… the world as a global community, and the political, economic, environmental and social implications of this, and the role of the European Union, the Commonwealth and the United Nations (QCA, 1999, p. 14)
> Pupils should be taught about… the United Kingdom's relations in Europe, including the European Union, and relations with the Commonwealth and the United Nations… the wider issues and challenges of global interdependence and responsibility, including sustainable development and Local Agenda 21 (QCA, 1999, p. 15)

Despite this lack of recognition of global issues in mainstream school curricula, development education centres and national agencies in the UK now promote global citizenship education and the inclusion of global issues in schools. The global dimension features in the cross-curricular theme of education for sustainable development, in the official discourse of Department for International Development (DFID), and in the work of Development Education Centres (DECs) and other global education NGOs. For example, a consortium of organisations including the Development Education Association (DEA), Oxfam, the Commonwealth Institute and the Council for Environmental Education (amongst others) recently published the document '*Citizenship education: the global dimension'* (DEA, 2001), alongside the launch of the related website (www.citizenship_global.org.uk) to complement the English Citizenship Curriculum. The consortium used the phrase 'the global dimension to citizenship education' (DEA, 2001, p. 5) reflecting the controversial nature of global citizenship education. The project emphasises human rights and social justice as key concepts in a global dimension, focusing on poverty reduction. However, other than this document and the unofficial guidance from NGOs in England and Wales, no policy document exists that is comparable to the Europe-wide Global Education Congress *'European Strategy Framework for improving and increasing global education*

in Europe to the Year 2015' (2002)[1] or the Scottish strategy document *'An International Outlook: Educating Young Scots about the World'* (2001). The latter document is particularly significant because it offers *official* acknowledgement of the need for global citizenship and the potential of what is termed international education (although here again there is no explicit reference to gender). Although there is no guarantee that these documents are being widely adopted in schools, both recognise the possibilities of global education at a strategic level.

Significantly, NGOs also cannot agree about terminology or meaning. 'Global educators' – NGO workers and teachers promoting global education in schools in England – have been found to be particularly hesitant about using the term 'global citizenship education' until more homogeneity in the movement exists about its meaning and pedagogy (Marshall, 2005 forthcoming). Those from development education centres also appear to be concerned about how notions of development were being re-conceptualised in schools. Global citizenship in schools is usually described in terms of the knowledge and understanding, skills and values and attitudes required (Oxfam, 1997, 2000) – terms that are vague but which can also support multi-cultural, anti-racist, development and environment education.

Interviews with English global educators and an analysis of key documents from organisations and commentators within the field, indicate the existence of at least eight fairly distinct but resilient pedagogic traditions of global education,[2] many of which have the potential to raise the profile of global gender issues. Some of these traditions overlap, some have more theoretical than empirical relevance and together they traverse the spectrum from liberal-individualism to more cosmopolitan notions of global citizenship. The dominant discourses in the field seem to reflect the conventional development education, human rights and Christian traditions. However a younger generation of global educators appears to have recognised the importance of globalisation processes as they work through concepts of global citizenship. The curricular field is therefore heterogeneous and fluid in relation to the different conceptual traditions listed below.

7.4 Global Education Traditions in England

- *World Studies* – now also future studies, with its roots in values education and education for justice and equity (using participatory learning approaches).
- *Human Rights Education* – concerned with citizenship education and different from development education tradition.
- *North/South Linking* – concerned with development education and education for justice, traditionally dominant in Europe.

[1] Available online at www.globaleducationeurope.net (accessed 30/03/05).

[2] The views of Doug Bourn of the Development Education Association are acknowledged, with his identification of at least five of these traditions.

- *Development Education in the Era of Globalisation* – recent tradition with globalisation theory as the knowledge base.
- *Traditional Development Education* – concerned with sustainable development education with development theory as knowledge base.
- *Global/Global Citizenship Education* – pragmatic tradition working with current official discourse.
- *Environmental and Sustainable Development* – originating from the environmental education movement, prioritising of sustainable development.
- *Christian Global or Development Education* – working overtly in conjunction with Christian morals and values.

From a gender perspective, global citizenship pedagogies, although problematic, could potentially be an important new vehicle for promoting gender equality at regional, national and international level. However, the representation of gender in relation to the content of these pedagogic traditions is erratic and occasional. It is not a systematic theme nor is gender equality a targeted goal. Gender is only sometimes represented in the lists of 'global issues' that NGOs recommend to be taught. For example, the Development Education Association documentation on global dimensions of citizenship education (DEA, 2001) fails to include gender as a key issue for exploration even though it identifies highly relevant ideas for teaching and learning such as trade, faith, school-linking, slavery, Local Agenda 21, health and so forth.

The global education project run by the British Overseas Aid Group (BOAG) and DFID's *'Get Global'* project for Key Stages Three and Four address the idea of global citizenship but significantly, because of its Freirian pedagogic approach, encourages teachers and students to arrive at with equality issues themselves. This low-key approach contrasts with the fact that the organisations involved and the suggested resources of information are well-known for being actively involved in global gender-related projects of some kind, often in relation to issues concerning poverty and health. Encouragement is to be found in the fact that at the launch of *Get Global* (Price/ActionAid, 2003), gender issues and global citizenship were considered in some workshops and keynote speeches.

These hesitant responses are surprising since gender has found its place as one of the most important items on the global agenda. Indeed, now high on the international development agenda, women's education exists in a new global context that exposes critical aspects of gendered power relations, shifting boundaries between the public and private spheres and encourages new forms of female agency. Gender inequalities in education since the 1980s have received an extraordinary amount of attention in international declarations and treaties that put 'flesh on the minimalist bones of existing human rights legislation' (UNESCO, 2003–2004, p. 27). The Convention on the Elimination of all Forms of Discrimination against Women (CEDAW) was ratified by 173 countries and came into force in 1981. As a result of the Dakar Framework, two of the key Millennium Development Goals supported by the World Bank, UNESCO, UNICEF etc., are to:

> achieve universal primary education: Ensure by 2015 children everywhere, boys and girls alike, will be able to complete a full course of primary schooling (Goal 2:Target 3);

> promote gender equality and empower women: Eliminate gender disparity in primary and secondary education, preferably by 2005, and to all levels of education no later than 2015 (Goal 3: Target 4).

At present the international concern is to bring the 28 countries (most of whom are in sub-Saharan Africa) who will probably not meet such Millennium Development Goals into line, although financial assistance is not forthcoming (reflected in recent UN-official calls for the doubling of spending on Millennium Development Goals). Attention is now be paid to the how far both boys and girls have (a) the right to an education, (b) the right within education and (c) the right through education (UNESCO, 2003–2004, p. 2). As the Director General of UNESCO pointed out, 'the scourge of illiteracy still affects more than 860 million adults, almost two thirds of whom are women' and, whilst millions of children fail to get access to schooling or drop out of education, the majority of such children are girls (ibid). Women's education as an issue has the potential to expose power relations, shifting boundaries between public and private spheres and new forms of female agency.

Global citizenship education could potentially become an appropriate curricular vehicle to address such global gender inequalities. To do so, it would need to address the ways in which gender relations constantly shift in globalising economies around the world. Globalisation is a destablising force that exposes the harsh life-realities which women face across the world. At the same time, as Stromquist and Monkman (2000) observe:

> Globalization… has introduced contradictory ideas in the reproduction of gender ideologies and practices in society: It has provided the space for critique and alternative social visions and at the same time transfers representations of women and men that are not only highly genderized but also solidify very traditional views of these two sets of actors. (Stromquist & Monkman, 2000, p. 8)

The multi-faceted and complex concept of globalisation destabilises modernist or state-centred conceptualisations of citizenship – although it 'does not necessarily mean the death of the state or of particular imagined communities' (Blackmore, 2000, pp. 150–1) Instead, Blackmore argues, globalisation is about:

> … the changing nature of state relations and relations between different communities (local, regional and global); labor and capital relations; relations between the individual, state and market, and between nation-states; and how education is positioned in these shifting relations. The issue for feminists is to understand better how these new formations and relationships are gendered and to consider how we need to 'develop anti-imperialist curricula and transnational feminist practice. (2000, p. 151)

Nira Yuval-Davis (1992) contends that an Orwellian 'doublethink' can be identified in debates about issues of female citizenship (in arenas beyond the nation-state) – a paradox that is not exclusive to totalitarian societies. On the one hand, since the UN naming of the International Year of Women in 1975, women's movements have been 'globalized' (Heater, 2002, p. 142), and that the recent Beijing conference was particularly significant because of the explicit inclusion and recognition of female agency. In the West, especially where the advantages of globalisation are more likely to be experienced, social and cultural developments suggest that the woman's movement is experiencing something of a rejuvenation. Commentators have talked

about how women of different ethnicities, races and class have differential access to the state in different parts of the world – in other words, questions of national and racist exclusions are receiving a higher profile (Dillabough & Arnot, 2002). Economic globalisation has seen a higher level of participation of women in the labour market with, for example, educated middle-class women having increased opportunities for professional and managerial employment; although many of these feminised jobs in the global arena are low paid, temporary and/or insecure (Acker, 2004, p. 35).

Whilst the meaning of 'social justice' and 'equity' continues to be disputed, issues of gender and social justice have permeated debates about the effects of cultural and political globalisation albeit with an emphasis upon individualised notions of choice and rights (at least at a theoretical level). However, within this context, an example of *globalisation* doublethink is illustrated by the existence of obstacles and contradictions for women. For example, whilst 'women feel both the pain and the pleasure associated with seductive notions of choice', Blackmore (2000) poignantly argues that they 'largely bear the responsibility as the competitive state withdraws from its social welfare obligations while reprivatizing women's productive labor' (p. 135). Inequality and poverty are said to be the main negative outcomes of globalisation for women (Acker, 2004; Blackmore, 2000), but entry into the global capitalist arena has also meant 'a restoration or strengthening of traditional, capitalist gender, race and class hierarchies' (Acker, 2004, p. 37). Inequality and poverty contributes to international trafficking in women and children for prostitution and other forms of labour. However, generalization about the effects of these global changes (as seen in welfare state systems, employment and migration for example) is highly problematic because effects vary temporally and geographically and according to gender, race and ethnicity. However, whatever these differences, 'it seems that women may be more negatively affected than men' (Acker, 2004, p. 36).

Commentators now consider the multi-layers of globalisation, and a dominant way of conceptualising these levels has been in the form of the dualism. A distinction is made between globalisation from 'above' and globalisation from 'below' or the 'upper' and 'lower' circuit of globalisation – referring to the globalising bureaucrats at the upper level and the transnational social justice forces at the lower level. Henry (2001), for example, argues that it is important for feminists to engage with this relationship by thinking about 'how the upper can be made to engage with the lower' (p. 96). However, we must not fall into the trap of simply equating these levels with the bad and the good respectively, nor that any education about globalisation or education for social justice should focus on the empowerment of those at the 'lower level'. It is more that there is an urgent need to recognise that globalisation can no longer be presented as a solely negative, neutral or straight forward 'economic' term, especially when considered in conjunction with issues of gender, race or ethnicity.

There are clearly aspects of globalisation processes that we can be used to strengthen claims for equity and empowerment in education, with one of the key discursive spaces for mounting such a claim existing in global citizenship education. Unfortunately, working against women in the West particularly is the claim

that 'that girls and women are no longer educationally disadvantaged – or more strongly, that boys and men are now the educationally and occupationally disadvantaged groups' (Henry, 2001, p. 93). This may be one of the reasons why very little has been written at any level about gender and global citizenship education. Education remains a central strategy for competing in the global arena and as the state becomes much more of a market player than a mediator between civil society and the economy (Henry, 2001, p. 90).

There have been some attempts to link discussions of gender, globalisation and global education. An exception to the rule can be found in the work of, Professor Annette Scheunpflug who, at a recent Global Education Network Europe (GENE) conference, proposed a framework for global education that recognises the complex processes of globalisation, global civil society and global citizenship. Her discussion of the challenges for global learning highlighted the need to deal with knowledge and non-knowledge, certainty and uncertainty, local relationships and spacelessness and familiarity and strangeness (2004, p. 40/1). Students would be offered a learning atmosphere where contradictions and 'changes of perspectives' could be explored (ibid, pp. 40–42). Scheunpflug's recognition of the factual, temporal, spatial and social dimensions of what she terms global education offers a potential framework for understanding of the relationship between women and globalisation – although the 'economic' dimension of global education is perhaps underplayed in this analysis.

One of the great advantages about global education over and above the constraints of the type of national citizenship education programme described earlier is that it allows recognition of the diversity of global cultures, gender formations, relations and identities. It allows children to engage in discussions not just about cultural differentiations in gender – different forms of masculinity and femininity within one culture and across different cultures – but also encourages children to recognise rather than avoid any differences between men and women – whether in terms of their knowledge, experience or identifications. For example, young people have much to learn from an analysis of the functioning of the World Bank initiatives in relation to development and how this affects women and men's lives. They could also consider the post-colonial critique of how women in the developing world are portrayed and the strategies being developed to encourage women's agency and global alliances around development.

Pupils could be introduced to the different meanings attached to women's citizenship globally by a consideration of the texts of recent 'redemptive' declarations. Elaine Unterhalter's (2000) research, for example, demonstrates how international educational policies frame contemporary understandings of the 'female citizen'. Her analysis of the declarations by, for example, the World Bank and UNESCO reveals the essentialism and passivity ascribed to women's citizenship in the 'developing world' and how an investment in female education is restrained by limited notions of stake holding and citizenship. Women are seen either as needing to be educated as further mothers of citizens, or as part of economic development – rarely in their own right. In contrast, the Beijing World Conference on Women challenged such redemptive agendas by attempting to put forward a discourse of female agency

and human rights that acknowledges 'the diversity of women and their roles and circumstances' (WCW 1995a p. 154 quoted in Unterhalter, 2000, p. 95). The Beijing Declaration stated its commitment to:

> The empowerment and advancement of women, including the right to freedom of thought, conscience, religion and belief, thus contributing to the moral, ethical, spiritual and intellectual needs of women and men, individually or in community with others, and thereby guaranteeing them the possibility of realising their full potential in society and shaping their lives in accordance with their own aspirations. (WCW 1995a p. 155 in Unterhalter, 2000, p. 95)

Noticeable is the refusal of this Declaration written by women for women to link the need for women's education to children or the economic growth of society – instead the rationale for women's education is associated with the necessity of women as a social group to be engaged politically through decision-making that is premised upon a social context with others in society. The social actions of women are therefore pivotal to this feminist challenge not as a straightforward notion of identity politics but as legitimate social actors inside the public space of social life.

There are already some examples of interesting practice, albeit in the unofficial field of global citizenship education which offer young people a choice to engage in gender and development issues. Some of the most interesting and encouraging resources on gender have come from organisations working within the movement for global citizenship education in the UK. Actionaid, for example, offers a resource for students to explore 'women's rights in relation to HIV/AIDS and education' (Actionaid, 2003). As part of this online resource Actionaid provides a fairly comprehensive flow diagram of the reasons for gender differences in education. Students are also offered opportunities to explore issues of gender and identity through the use of photographs and through consideration of the role of the development-worker in the less economically developed country. Although this sort of initiative has its limitations, not least the fact that it is an example of what Unterhalter (2003) might call a 'women in development' (WID) approach (rather than a 'gender and development' [GAD] approach) because it neglects to consider the patriarchal nature of the educational and state systems, it goes some way to consider the multidimensional nature of development and the multiple identities of the female global citizen.

A gender-sensitive, global citizenship education programme could usefully take up the concerns of the international human rights community that, according to Bunch (1995, p. 17), has also begun to recognise 'gender-based violations as pervasive and insidious forms of human rights abuse'. The mass violation of women's human rights is not generally considered an appropriate topic for national citizenship education in schools not least because again it is largely located with the 'private' sphere of intimate relations – but education about the effects of economic globalisation and other global forces could and arguably should include issues such as: the battery of women; their physical and psychological imprisonment in the home; the violent entrapment of women in prostitution; violence against women in the home and in places of work; sexual exploitation and pornography; maternal

mortality and compulsory pregnancy; rape; female infanticide; the malnutrition of girls; and women, girls and AIDS/HIV.

These are human rights violations that demand urgent attention but they are also issues of relevance to young people. Gendered and sexualised violence are also part of educational environments (Sunnari et al., 2003). There is clearly much work to be done to address such violence particularly in relation to the education of boys (Breines et al., 2000). However, even the most critical models of liberal education are simply not sufficient to address such issues. Citizenship education itself would require far more extensive and arguably radical politicisation in order to address such real but usually hidden gender violence in the public and private spheres. Bringing the citizenship agenda into the global arena therefore may go some way to re-examining the gender relations in the public-private sphere and gender power relations.

The education of the 'global citizen' may also encourage young people to engage in discussion of social change but also in non-exploitative forms of intercultural communication and sharing with countries that might experience economic or humanitarian predicaments on a more significant scale. The goals of global citizenship education encapsulate the key themes of justice, equality, tolerance and peace ensuring that children are educated about the most important social and economic issues in the world. There are now some attempts to address gender equality and to show how female citizenship issues affect global, national and local communities. Organisations such as the United Nations Development Fund for Women (UNIFEM) have issued mandates which recognise that multilateral institutions have a responsibility to understand and respond to the need to 'build women's capacities to advocate their own interests' and to bring 'the women's movement's experience with empowerment into the context of multilateral policy making' (www.unifem.undp.org). Women have made a major contribution to the promotion of global peace and social harmony and have contributed substantially to national development. Arguably, gender-sensitive global citizenship education programmes can provide the political spaces in which their contribution can be valued. Similarly virtual global communities can offer women opportunities to experience autonomy and independence and can facilitate active involvement in global alliances (Kenway & Langmead, 2000). Citizenship education from this perspective takes the form of questioning and debating what constitutes democratic citizenship, human rights or human capital in a global arena.

7.5 Engaging Women's Agency Nationally and Globally

Unterhalter (2003) makes the important distinction between theorists predominantly located in academia that have focused on 'women in development' issues in contrast with those who take seriously 'gender and development'. This is an important distinction since it *might* be that proponents of citizenship education work with the former perspective and those interested in global citizenship education with the

latter. Arguably citizenship education offers an important space for thinking through these two ways of strategising and conceptualising gender issues. In this context, it is important to consider the relationship of activists' ideas about gender justice, rights, capabilities and empowerment to patriarchal formations in different nation states. By considering the problematic nature of universalising notions of the 'third world woman' or 'poor woman as victim', critical questions can be raised about issues of gender and identity. Furthermore, the hidden debates, ideologies and perspectives within the term 'development' can encourage students to consider how citizenship, empowerment and development can be measured.[3] Commentators such as Fiona Leach (2000) highlight the dilemmas associated with current methods of 'measuring' development strategies in relation to education and gender, where indicators merely relate to the quantity and longevity of female students and teachers in schools rather than the nature of gender equality itself.

The UN Assistant Secretary-General's retiring speech in March 2004 highlighted the fact that 'virtually nowhere are women's rights given the priority they deserve'. Nevertheless, it is important to acknowledge advancement in the global status of women:

> Progress has been made in six broad areas: awareness of the importance of gender perspectives in peace support work, development of gender action work plans in disarmament and humanitarian affairs, training in gender sensitivity, deployment of gender advisors, prevention and response to violence against women; work on codes of conduct, including sexual harassment; and support to greater participation of women in post-conflict reconstruction, post-conflict elections and governance. (King, 2004, p. 3)

Indeed, as this quote indicates, the women's movement has fundamentally changed the national and global civil society and civic agendas. Citizenship education programmes will need to be far more imaginative if they are to recognise the extent of this change.

We have pointed out some of the ways in which such programmes can consider the many fundamental questions about the desired relationship between men and women in society and within a global arena. At the heart of the citizenship project, whatever the approach, lies the notion of political agency. Yet as we can see, thus far, the promotion of female agency and power are tasks that have hardly been discussed in relation to citizenship education. Recent research has shown that, although there are some spaces in schools in which agency, negotiation, avoidance, opposition and resistance can be developed, these pedagogic spaces are limited, especially for girls (Gordon et al., 2000). Often the spheres in which female agency can be developed are constrained by conventional definitions of femininity and the regulation of girls' sexuality. It is possible these constraints could be challenged by considering the role of female agency in the global arena. The rhetoric of equal and democratic

[3] Whether Kabeer's (discussed in Unterhalter, 2003, pp. 5–6) three dimensions of empowerment or Sen's (1999) 'capabilities approach', a concern with material inequality or a more post-modern concern with societal representations of inequality are employed, it will be necessary to take their underlying values and ethics into account.

participation that characterises much of citizenship education can place girls in a contradictory relationship to civic activity. The apparently ideologically neutral model of the 'active citizen' we have seen being promoted through the English citizenship curriculum sustains masculine conceptions of citizenship premised upon the subordination of women. If politics were taken not in an instrumental or pragmatic sense, but as a horizon which 'opens up the possibilities of human action and which is a contested symbolic, material and factual terrain', then political education would offer the opportunity to create new social identifications and forms of action (Morrow & Torres, 1998, p. 22; Dillabough & Arnot, 2002).

Gender relations are changing globally and within many nation states. They are also changing *within* social class cultures and ethnic or religious communities (Arnot et al., 1999). A critical feminist politics of citizenship would emphasise the problem of gender inequality globally and nationally and work towards its eradication. But it would do so only once questions about particularity and specificity were addressed not merely as token elements of social life or as mere discourse, but as fundamental to understanding social differentiation in a changing yet unequal world order. Educational institutions therefore need to play a major role in reshaping citizenship identities in line with such contemporary changes but they need to be aware of the models of citizenship they are promoting by considering, for example, how female agency is being recognised. Local, national and global civic education programmes in schools could do worse than bring out into the open, illustrate and discuss these political and gender tensions for a new generation of both male and female youth. Central to any new political agenda is, therefore,

- The importance of women's social location in the state and globally in relation to access over power and privilege
- The need to recognize the opportunities and threats posed by globalisation, development and the global arena for women
- The necessity for addressing the re-distribution of resources and the recognition of those women who are located outside normative definitions of citizenship
- The need for women's social rights to be recognized in the cultural, economic and political decisions which affect the shape and direction of their futures

7.6 Conclusion

This chapter illustrates how important it is to be cautious in attributing too much hope to a project of citizenship that is premised upon 'freedoms' that repeatedly recast themselves inside a liberal political framework that has failed to offer women full citizenship status. At the same time, such caution should not prevent us developing alternative visions of citizenship that move away from the oppressive dimensions of liberal democratic or civic republican concepts, to find other perhaps more cosmopolitan (Nussbaum, 2002) meanings of citizenship and ways of engaging in the political space of social life. If gender equality is to become more than just a

silent dimension of global and national citizenship education, then official support must be given to developing an appropriate agenda for schools. The starting point for this could fall under any or all of the following initiatives:

- The formation or strengthening of appropriate international networks for the development of global citizenship education in relation to gender equality
- The development of, and cross fertilisation of comparative research studies on gender and the nature of citizenship education in a global context
- The promotion of appropriate forms of citizenship education for trainee teachers and educational practitioners as a means of highlighting and addressing contemporary national and global gender concerns and notions of female agency
- The development of appropriate citizenship education curricular guidance and material in which gender equality is integral

As James Donald argued, citizenship has no substantial identity until it is located within an understanding of the organization of the symbolic social order. In this respect, the radical potential of the concept is as important as its discriminatory political history. The field of global citizenship education is a fluid, undefined space with an alliance of different groups working to promote global issues and global citizenship in schools. Spaces to address gender equality are there, particularly within the development studies and human rights traditions.

We have argued that there is an urgent need to recognise gender relations both as a product and as an influence on the globalising world. Gender related issues must be firmly on the global citizenship agenda in the twenty-first century not least because of the restructuring of work patterns, family structures, the trafficking of women and migration. These issues challenge the boundaries of our nationally focused civic curriculum with its ideals of civic republicanism and avoidance of egalitarianism as ideology. Gender-neutral models of citizenship education will not be adequate to address such global gender concerns.

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Chapter 8
Globalization, Education Reforms and Immigrant Students in Canada

Suzanne Majhanovich

8.1 Education Policy Shifts and Neo-liberal Rhetoric in Ontario in the 1980s

In 1988 the Premier of the province of Ontario commissioned a report that signaled changes ahead in provincial education. The report was entitled *People and Skills in the New Global Economy* (1990) and was supposed to furnish a picture of the status of education in Canada, and more specifically in its most populous province, Ontario. Moreover, the Premier wished to provide a blueprint for changes in education geared to preparing citizens of Ontario to be active members in the global economy. The document was prepared by the Premier's Council of Advisers, the majority of whom (20 out of 34) came from the business sector. The Government was represented by the Minister of Education, Skills Development and Colleges and Universities, the Minister of Labour, the Minister of Economics and Provincial Treasurer, and the Minister of Industry, Trade and Technology, but the education sector included only two university presidents, a president of a community college, a professor who was also chair of the Science Council of Canada, and one school trustee. Considering that the plan produced would set into motion far-reaching changes in education and training in the province, the Council was remarkable for the absence of representation from the education community. To be fair, the final report does acknowledge input from professors at several universities and one member of the Toronto Board of Education.

Given the make-up of the Council, it is not surprising that the substance of the report reflected a business mentality and what in vernacular terms is called "Bizspeak." Headings such as "Higher-Value-Added Restructuring," "The Drivers of Skills Change," "The Training Imperative," "Labour Force Displacement and Adjustment" to cite a few convey the tenor of the document. The concern with test-scores of Ontario students in international assessments, drop-out rates, and standards, and the need to raise them are all key topics which for some time now have been identified with a right-wing agenda as Aronowitz and Giroux (1985, 1993) and Apple (1999, 2001) and others have made very clear.

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What might surprise some is that the government of the day was Liberal, a centrist, even at times a slightly left of centre party. The fact that such a commission was set up under precisely that party demonstrates the growing influence of global neo-liberal/conservative trends that seek to replace education as a public trust with a system governed by the rules of the market (see also Majhanovich, 2006; Zajda, 2005). The message of neo-liberals has been so persuasive that even when the provincial Liberal government was supplanted by the (Social) New Democrats in 1990, the right wing rhetoric continued, albeit with some attention to traditional concerns and values of the left. A Royal Commission on Learning was set up (1993) to develop "a vision and action plan to guide Ontario's reform of elementary and secondary education." The Commission was charged with reporting on education in Ontario focusing on Shared Vision, Program, Accountability and Education Governance. The final five-volume report, "For the Love of Learning" (1994) provided suggestions on restructuring school curriculum, and recommended that a system of testing be put into place to ensure accountability. It was at this time that an arms-length quasi autonomous organization to be called EQAO, "The Education Quality and Accountability Office" was suggested as the organization to develop and administer the new testing program. The message that education was to be seen as a training ground serving the needs of industry and commerce was clearly conveyed as a basic assumption. It was during that political interlude that the Ministry of Education had its name changed to the Ministry of Education and Training. In the balance, however, it must be admitted that the "Love of Learning" report produced by the Royal Commission did acknowledge traditional values of social democrats such as a focus on Early Childhood Education, a progressive vision in the tradition of Dewey as to how schools would function, and a strong sense of reducation as a force for the development of social justice and equality. Still the Report held mixed messages pleasing to factions of both left and right persuasions. But that was to change radically. As Ontario was governed from 1995–2003 by a truly right wing conservative government, one that sought to bring about a "Common-Sense Revolution," the right wing impact on education was solidified.

The Province of Ontario, Canada which has been governed by right-wing, left-wing and centrist governments over the past decades provides a context in which one can observe the changes in education that Western English-language countries in particular have been experiencing. It can be argued that in the new global economy so heavily influenced by the priorities of such multi- and transnational organizations as the World Trade Organization (WTO), the World Bank, as well as international trade agreements, NAFTA in North America, and the GATS (See Dale & Robertson, 2002; Schugurensky & Davidson-Harden, 2005), education, prized by so many as the means to a better life has fallen victim to the lean and mean competitive arena that is the reality under an unfettered market economy.

Issues of equity and access are a growing concern for those disadvantaged groups who are facing formidable obstacles in the new educational order. Public school systems have been radically changed when governments apply a neo-liberal agenda such as the one outlined in the Ontario document *People and Skills in the*

New Global Economy. One obvious shift is found in accountability requirements and how they are met. In this paper, I focus on two outcomes of the accountability imperative; namely, the growth of standardized "high-stakes" testing, and change in financing formulas for school systems to realize economies. These outcomes promoted in the name of "common sense" and fiscal responsibility have made a serious impact on the most vulnerable and the disadvantaged in public school systems, especially on new immigrants. It can be argued that the neo-liberal shift in education compromises equality on several fronts, and raises barriers to access to full membership in the society, ironically, the very issue in the new economy that the neo-liberal programs purport to address.

8.2 Implications of Meaning Shifts in Educational Language

Before addressing specific examples, it is important to consider the way language is used in the new educational order. One could contend that in part the reason for the success of the shift to the right in educational matters is the subtle change in import of certain terms always taken for granted. The term "accountability" itself is one important example. No one would deny that educators must be accountable to students, parents and education authorities for the program and content they deliver. However, as Ben Jaafar and Anderson (2004) have pointed out in a very perspicacious study, whereas accountability in the past has involved something they term EPA (ethical-professional accountability) – attention to the ethical concerns of the profession, in recent years accountability has come to mean something quite different, something they term EBA (economic-bureaucratic accountability) which incorporates different values and concerns. This type of accountability is something that educators might not be prepared to ascribe to since it includes among other things notions of educational efficiencies, schooling as a utilitarian endeavour, a privileging of certain subjects regarded as more practical and useful in the new economy, and a belief that only the measurable is worth teaching. It is necessary to clarify the diverse visions of accountability. Unfortunately, a public grown skeptical of teachers, once among the most trusted and respected members of society, may tend to view any attempts to unmask problematic aspects of the new EBA as hair-splitting and irresponsible.

Another shift in discourse concerns testing and assessment. As Popham (2001) has pointed out, for years teachers were entrusted with the task of evaluating their students' learning, supplemented by occasional large-scale standardized tests. Today, test construction has become a big and profitable business. Western school systems are increasingly subjected to batteries of standardized testing especially in literacy and mathematics skills, but in some cases, in other subjects as well. Does the shift reflect the lack of confidence in the teaching profession to assess adequately or are other factors involved? The issue of language is again an important one, since the public may not understand exactly what scores from standardized tests are showing, nor may they realize how extensive high-stakes testing impinges on the curriculum and the way it is taught. One disturbing factor is the growing

evidence of losers in the new assessment regime. Such an outcome is very much in keeping with a neo-liberal view of the world that values competition and accepts as necessary that there will be winners and losers; social Darwinism is the rule of the day. When we find that the losers are usually the most disadvantaged, vulnerable groups in our society such as new immigrants, refugees, and native peoples, we need to ask if the assessment is really accomplishing what it promises and if the trend to increasing standardized test programs needs to be checked.

8.3 Standardized Testing and Public Education

Deficiencies of standardized testing programs are well documented (Popham, 2001; Kohn, 2000; Crane, 2004; Barlow & Roberson, 1994; Robertson, 1998; Moll, 2004; Froese-Germain, 1999; Murphy, 2001). Several of the severest critics are test-constructors themselves (i.e. Popham) and still believe that it might be possible to develop effective standardized tests (Popham, 2001), although they have serious reservations about the tests our school children currently must undergo.

The Ontario Secondary School Teachers' Federation has summarized the major problems they have identified with high-stakes testing drawing on information from researchers in the United States and applying it to the Ontario context. They prepared a news release for the Ontario public entitled "Ten things wrong with high stakes testing." The major issues they identify are outlined below:

- Standardized tests are not good indicators of student achievement, but provide a snapshot of where a student stands on a given day. (…)Test scores are not good predictors of future success.
- Standardized tests do not cover all school learning, but mainly focus on language and math skills.
- Standardized tests take time away from other learning. Sixty-seven percent of teachers report "teaching to the test" at the expense of regular curriculum. This also often leads to the erosion of music, art, physical education and support programs.
- Standardized tests hurt poor, minority and identified students. The test results most strongly reflect neighbourhood socio-economic status, not student learning. In some communities, minority students, English-as-a-Second-Language students and those with learning problems have failure rates up to 80%.
- Dropout rates and student failure rates increase.
- Testing stress is harmful to student health.
- Public schools are tested but not private schools.
- Standardized tests are flawed; there are serious concerns about score reliability.
- More testing does not improve education. Making students do more standardized tests does not improve students' achievement, any more than constantly taking your temperature will improve your physical health (adapted from OSSTF, 2001a).

It is ironic that the public has been fed the message that standardized tests will ensure that students meet the expectations of the program, and that academic

standards will rise. In fact, there is considerable evidence that the opposite is true. As Kohn (2000) and others have observed more testing does not equate to better results although children may learn how to take tests and succeed on them through the drill and focus on test-taking and how to deal with specific types of test items. In fact, there is no guarantee that the majority of standardized tests even evaluate real or desired learning.

Linda McNeil (2000) has outlined how the school reform movement that brought in outcomes-based education and standardization actually restricted the ability of teachers to instruct effectively, undermined promising experiments such as magnet schools where minority students could follow programs tailored to their particular talents and interests, and encouraged attrition of the most talented teachers while rewarding those less flexible. McNeil found that when standardized testing was imposed on the Texas school system, it worked to move control of learning away from teachers and school districts and to external bureaucracies that applied a business model of governance. Again, it is important to analyse the use of language. Educational accomplishment has become overly associated with measurable outcomes; areas valued in progressive, more holistic education such as initiative, creativity, imagination, conceptual thinking, judgment, commitment, good will and ethical reflection (see Ayres, 1993) tend to be sidelined because they cannot easily be quantified or given numerical scores. There is a sense that technical experts should control the system with the result that democratic governance of schools is reduced. Teachers compromise their best practices to prepare children for the test. McNeil showed that rather than enriching the classroom learning experience, teachers, in order to focus on the type of material dealt with in standardized tests, omitted content, avoided controversy, gave students bare-bones summaries of material thereby mystifying the content, attempted to keep the curriculum neutral and culture free (as if that were possible), reduced class discussion to devote more time to drilling for the often de-contextualized test items.

McNeil's findings regarding the Texas curriculum were certainly replicated in the Ontario restructuring exercise when curriculum documents were being prepared. Every guideline had to follow a set format with the same sections. Document writers were warned to avoid terms like "values," "culture," and "critical thinking," and to focus on items that could be measured numerically.

Certainly there is much concern that levels of achievement in standardized tests are related to socio-economic status. Many items are culturally connected. Students from higher socio-economic levels with life experiences from the majority culture are much more likely to succeed on the standardized tests. Popham (2001) has estimated that 15% of reading, 65% of language arts, 45% of science and 45% of social studies, but only 5% of mathematics items are linked to socio-economic status (p. 65). It is no wonder that he finds it patently unfair to condemn schools with large populations of disadvantaged or minority students when scores on the tests do not meet expectations.

One begins to sense that standardized testing is a tool of the neo-liberal/conservative groups to perpetuate class distinction and inequality. One is reminded of Michael Apple's analysis of the growth of the new-right discourse (1999, 2001)

in which he proposes the theory of a coalition or "hegemonic alliance" (1999, p. 114), as he terms it, of various right-wing groups of both the neo-liberal and neo-conservative stripe who now seem to be driving the educational agenda. One faction in the alliance is designated by Apple as the professional and managerial new middle class. This group, comprised largely of members of the business sector is attuned to business rhetoric and so favours measurements and standardized assessment to guarantee accountability (of the EBA type). Such a group sees no problem with schooling as a stratifying mechanism (p. 59); after all, they live by the rule of Social Darwinism. Self interest is implicit because, as Apple observes (p. 58) the standardization reflects their own cultural capital with the result that their children will actually face less competition from children from lower social strata. As critics of high-stakes standardized testing have pointed out, underprivileged students, and minority groups do indeed fare poorly in such assessments and possibly will be denied access to higher education as a result of their low scores.

8.4 Standardized Testing in Canada

Canada has embraced the British and American zeal for standardized testing to demonstrate educational accountability. This is especially the case in the provinces with more right-leaning neo-liberal governments; namely, Ontario, Alberta, and British Columbia. Ontario and British Columbia also have the highest populations of new immigrants. To take Ontario as an example, it is worth noting that scare tactics were used on the public to make people believe that schools were not working, that standards were low or sinking, and that too many students were graduating from high school without adequate numeracy and literacy skills. Results from international tests were cited to show how poorly Ontario students were doing compared to their international cohorts. Actually Canadian students perform rather well on such tests, and if one takes into consideration that in several countries deemed to lead the pack, only selected students take the tests, whereas in Canada students of all abilities and backgrounds participated, the news is even more optimistic. As Barlow and Robertson (1994) have pointed out, using the OECD (1992) Indicators for mathematics from its document *Education as a Glance*, Canadian students rank among the best with mean scores either significantly higher or not significantly different from comparison countries such as Japan, Switzerland and the Netherlands. Froese-Germain (1999) also confirms that scores for Canadian students tend to fall in the average or above range when placed alongside scores of students in comparable countries. Froese-Germain and Robertson (1998) among others also observe that success on the tests reflects matches between test items and curriculum content. Robertson (1998) reports that with regard to the TIMSS (Third International Mathematics and Science Study), the official Canadian report notes that an overlap between what was taught and what was tested could vary from 53% to 98% (p. 78). The issue becomes more complicated since curriculum content varies from province to province in Canada where education is controlled by the provinces.

Whether or not certain topics covered in international assessments such as the TIMMS are appropriate additions to curriculum for certain classes is moot. What resulted however gave credence to arguments of certain sectors that the curriculum needed to be changed, made more rigorous, and more standardized across the country. In fact, that has been the tendency in Canada where despite the fact that control for education lies with each of the ten provinces and three territories, certain regions have begun to develop a more "pan-Canadian" agenda for education encouraged by the Council of Ministers of Education (CMEC) especially for learning expectations for such subjects as science. The Atlantic Provinces Education Foundation develops curriculum for the eastern provinces and in the Western provinces, The Western Canadian Protocol for Collaboration in Basic Education performs the same function for Mathematics, Science and Language Arts, the core subject areas; that is, the ones likely to be assessed through Canadian or International Standardized tests (Froese-Germain, 1999; Dunning, 1997).

Ontario develops its own curriculum documents although writers and ministry officials are familiar with content of core subjects in other regions of the country; the topics covered across the country (with the possible exception of Quebec) are more uniform now than they have been in the past.

Provincial testing in Ontario is managed by the above mentioned Education Quality and Accountability Office. A very ambitions and expensive program of testing was envisaged by EQAO in 2001 (See OSSTF News Release, 2001b). It included tests in Reading, Writing and Mathematics every year for grades 3 and 6, Science and Technology tests in Grades 4 and 7, and Social Studies in grades 5 and 8. Additional standardized tests in Mathematics were planned for grades 5 and 8 and Grade 9, as well as additional language tests in grades 4 and 7. A grade 9 Science test was to be added to the grade 9 standardized testing program and a history test in Grade 10 as well as English and Mathematics tests in grade 11. In Grade 10, students are required to write the Ontario Secondary School Literacy Test, a high-stakes test because in order to receive a secondary school graduation diploma, students must pass this test.

The other tests in the program are used for accountability to ensure that schools are meeting curriculum expectations. Schools that fell below the standard were supposed to receive some kind of program in remediation, but in fact, with the financial restraints in place, there is no money for such assistance. Instead, right-wing think tanks such as the Fraser Institute, as well as newspapers have taken to publishing scores and ranking schools. The magnitude of the planned testing program shows that Ontario education bureaucrats were caught up in the throes of test mania. In fact, to date the only tests that have been implemented are the Reading, Writing and Mathematics tests in Grades 3 and 6, requiring 2 weeks in May; the Grade 9 mathematics test, and the Grade 10 literacy test, a 5 h test administered over 2 days in late October. As predicted, the tests have proven far more costly to administer than was originally anticipated; parents and teachers resent the time devoted to preparation for the tests as well as their administration. In some cases, parents are resisting having their children write them at all citing high stress especially among the children in grade 3. The Grade 10 Ontario Secondary School Literacy Test has proven

to be the most contentious because of the potential that students will not be able to graduate from high school if they do not pass the test. Already thousands of students across the province have tried and failed one or both parts of the test more than once. According to Ricci and Taylor (2004) 120,000 Ontario students have failed the test over the 3 years it has been implemented (p. 64). Some parents are currently suing the government claiming that this flawed and unfair test is preventing their children from receiving a secondary school graduation diploma even though the students have met every other requirement.

Immigrant students have not done well on the test, but it has also caused problems for those students in vocational education programs. Such students normally only complete 2 years of high school after which they are granted a 2-year diploma, and then they move into apprenticeship programs. However, they too are supposed to pass the literacy test or they cannot qualify for apprenticeship programs. Some vocational schools have posted only about a 5% or lower passing rate among their students. Probably students in vocational schools do have low levels of literacy skills but from what teachers can gather about the test, there are serious problems with the test itself and the way it is marked. The passing score on the two sections can change from year to year and in the last few years students had to receive in the range of 60–70% on each of the reading and writing sections in order to be granted a pass. Finally the province was forced to develop an alternative for the so-called "students at risk." As of 2003 the Ministry introduced the Ontario Secondary School Literacy Course that students in Grade 12 who had previously failed the Literacy Test more than twice could take to meet graduation requirements.

A most disturbing feature about the literacy test, and in fact, about the standardized tests in general, is that they are biased against disadvantaged students and minority groups, especially those for whom English is not the first language. As mentioned above, Popham (2001) analysed the American standardized tests for bias in favour of students from higher socio-economic levels and not surprisingly found high percentages of items on language rich tests such as language arts, social studies, and science linked to socio-economic status. Similar analyses have been made on the EQAO tests with the same results. Murphy (2001) cites Robertson's 1998 observation regarding the grade 3 literacy test that used a reading passage with references to matters that might be outside the experience of minority students. Their low performance on the test might not have reflected low reading ability but rather limited knowledge of Canadian customs (Murphy, p. 15).

Similar problems have been detected on the high-stakes Grade 10 literacy test. Although teachers are not permitted to see the actual content of the test each year, the preparation material provided by EQAO leads many to suspect that the test is more about compliance to rules than actual literacy skills. For example, students can fail sections of the writing test if they write more or less than the stipulated number of words or paragraphs. A recent study by Ricci and Taylor (2004) compared teachers' expectations of success or failure among their students writing the test where teachers based their judgments on grades students were receiving in other courses in secondary school. There were large discrepancies with many students succeeding on the OSSLT who were failing all their high school courses as

opposed to students receiving a failing grade on the OSSLT while receiving high averages in their high school courses, including the English courses. Many suspect that the substance of the literacy test is seriously flawed, and perhaps that is something that can be fixed or improved. However, the fact remains that thousands of students in Ontario have failed the test and will not be able to receive a graduation diploma unless they finally succeed, or pass the Ontario Secondary School Literacy Course that is now offered as an alternate route to graduation. It is no surprise that as is the case in other countries and jurisdictions that employ large scale standardized testing, it is disproportionately the poor, disadvantaged and minority groups who fare poorly on the tests. This lends credence to Apple's (2001) suspicion that support for such assessments is strong among the new managerial middle class because they know their children have the cultural capital to succeed. The others who do not will be removed from the competition. If such an agenda is operating in Canada, and it appears that it is, that is very bad news indeed and conflicts with the image Canada tries to convey of a country of opportunity that welcomes immigrants, in fact, needs immigrants to meet its mission of continued economic growth and competitiveness in world markets. There are indications, however, that immigrants are facing increasing difficulties to obtain meaningful employment and their children are experiencing difficulties in the education system. This is particularly the case for visible minority immigrants who now make up the bulk of the over 200,000 immigrants accepted into Canada every year. Refugees encounter even greater difficulties.

8.5 Immigration and Refugee Students in the Canadian Educational System

A recent series published in the *Toronto Star*, a major Canadian newspaper outlines some of the difficulties newcomers, especially those with a native language other than English face in Canadian schools. The author, Andrew Duffy has spent the last year reviewing reports and longitudinal research studies on school boards in the large cities of Canada that have the greatest immigrant populations. He has also reviewed data provided by Statistics Canada on these populations. The findings are alarming. For example, Duffy reports (September 25, 2004) on a study conducted by David Watt and Hetty Roessingh (2000), ESL researchers from the University of Calgary. Their study tracked 540 ESL students in one Calgary high school over a number of years. In the school studied the first languages of about 40% of the students included Vietnamese, Chinese, Arabic, Spanish and Punjabi among others. The study looked at students registered in secondary school who withdrew before completing graduation requirements. Watt and Roessingh found that overall 74% of the ESL students dropped out before graduation and of those who began secondary school as ESL beginners, 93% were likely to drop out. Since the times when financial cuts were made to the public education system in the late 1990s, the situation has worsened considerably for immigrant and refugee students.

Duffy cited studies on immigrant achievement in British Columbia carried out by Professor Lee Gunderson of the University of British Columbia under the auspices of a grant from the Social Sciences and Humanities Research Council of Canada. Gundersons' study reviewed scholastic achievement scores in the Vancouver District School Board of over 2,000 immigrant students and compared them with Canadian born students. Parts of his study were published with L. Siegel for the Ministry of Education, Skills and Training in British Columbia (Siegel & Gunderson, 2005). It should be noted that the Vancouver District School Board is possibly the most ethnically diverse school board in Canada. Gunderson studied the grades students obtained in the core subjects English, Mathematics, Science and Social Studies as they progressed from the 8th through the 12th grades. He found what he termed a "disappearance" rate of 60% of immigrant students. He chose the term "disappearance" over drop-outs since he could not track how many students had moved, changed from the college/university track and dropped the subjects he was interested in, or perhaps had managed to gain the credit outside the system, or had re-entered the school system after a hiatus of some kind. Refugee students provided the highest "disappearance" rates, perhaps because of their traumatized background or impoverished conditions in Canada. Although he had not intended to consider race and ethnic origin-based statistics, Gunderson found it necessary to compare grades of immigrants according to linguistic and ethnic backgrounds. He found that Mandarin speaking Chinese students, most from affluent Taiwanese families outperformed all others including Canadian born students in Mathematics and Science. Their English and Social Studies scores were lower than those of Canadian-born students but the high math and science marks offset the differences.

Clearly there was a connection between socio-economic status and grades; the affluent Taiwanese origin students could afford to hire tutors and pay for private English lessons. In contrast to the Mandarin speakers, Spanish and Vietnamese speaking students, many of them refugees, quickly disappeared from the system. Punjabi-speaking and those from the Philippines could not manage regular classes and began to "disappear" from the school system soon after ESL classes were no longer available in the public system and the students were expected to move into mainstream classes.

Toronto and the surrounding region accept almost half of the total number of immigrants entering Canada every year. Immigrants tend to congregate in neighbourhoods where they can be near others who speak the same native language; this results in ethnic enclaves. A recent Statistics Canada study conducted by F. Hou and L. S. Bourne (2004) investigated Visible Minority Neighbourhoods in Toronto, Montreal and Vancouver and found that ethnic enclaves with high populations of Chinese or South Asians had increased from six in 1981 to 254 by 2001 (reported by Duffy, September 27, 2004). As visible minorities increase in certain areas around Toronto, the original white population begins an exodus to find neighbourhoods where the schools will have few minority children. As a result, some schools in the Toronto region now have over 80% of students who speak English as a Second Language. Is it racism that prompts the whites to flee areas of growing ethnic populations? Perhaps to some degree, but such trends are also indicative of parents'

wishes to find a school where their children will succeed, where teachers will not have to devote so much time to children with poor language skills, and finally where there are schools that score highly on the standardized tests.

Longitudinal studies tracking ESL students in public schools are available for Vancouver and Calgary. Yet Toronto with its surrounding area has no such study. As a result of the previous government's massive reductions in funding to public schools, cuts that affected the urban boards in particular, the number of ESL teachers has been severely cut back. In addition, the greater Toronto area school boards were amalgamated into one huge board, apparently in the spirit of fiscal responsibility, and so the few resource teachers left must serve a much wider area and many more students. Duffy reports (September 25, 2004) that whereas the previous Toronto School Board once had 20 research analysts, after the 1998 amalgamation which more than doubled the geographic size of the board as well as vastly increasing the number of students to be served, the number of resource and research personnel dwindled to three who have been unable to monitor the progress of lack thereof of a burgeoning ESL school population. Apparently there is one study dating from before the board amalgamation that showed a drop out rate of 31% of immigrant students. In the poorest region of the city, the rate rose to 71%.

It is noteworthy that following media reports, many Canadians believe that newcomer students, especially those of Asian origin are actually winning the highest academic prizes. Indeed, some new Canadian students receive extremely high scores on tests. But seen in the larger picture of huge numbers of ESL students in our public school system, these stars are actually rare exceptions. As Hetty Roessingh notes, "For every one of the ESL kids who makes it, there are hundreds who don't." (Quoted in Duffy article, September 25, 2004).

Because of growth of ethnic enclaves in large cities, and the exodus of the largely white former inhabitants of the area, something euphemistically called "rapid replacement," by Statistics Canada, there are now classes in some schools where virtually every student has a language other than English as a mother tongue. To complicate matters, the classroom teacher most probably is without any preparation in ESL methodology. It is no wonder that so many newcomers are falling through the cracks. The leaner, meaner reality for schools imposed by the previous Conservative government meant that under-funded school boards could not afford to hire specialist ESL teachers, and in Ontario, despite the obvious need for all teachers to be at least familiar with basic methodology for teaching non-English speaking students, there is no requirement in initial teacher education for inclusion of ESL training. Student teachers may choose to learn something about ESL through an elective course in the pre-service program, or may take more intense training through additional qualifications courses once they have their basic teacher certification. In my own Faculty, that prepares about 850 new teachers every year, perhaps 50 students might opt for the ESL elective – and it is a very short course that can only provide a bare introduction to ESL teaching. Hence, the current situation in Ontario includes a rapidly expanding population of English-Second-Language students in public schools with few qualified ESL teachers to meet their needs. ESL is not a priority with school boards. Many teachers and parents recall

earlier times when non-English speaking students just picked up English by osmosis. Conventional wisdom suggests that in the past, newcomers managed to fit in and so they can do the same today. However, people tend to overlook the fact that in that imagined golden age of schooling, most of the non-English speakers probably dropped out and took low-skilled jobs. Today, our post-industrial, technically advanced society demands highly educated people and credentials are required – especially credentials acquired in the new country. Those new Canadian students who remained in school and survived – and there were relatively few of them, had the benefit of being surrounded by English-speaking classmates and so, with luck, they did pick up English. This is unlikely to occur in the new ethnic enclaves where people can get all services in their native language, and in schools where the only native English speaker in a class may be the teacher and a handful of other students.

8.6 Evaluation

As the new harsh rule of the market has taken hold in Canada, the public school system has changed dramatically. Accountability as defined in terms of prerogatives of the business sector has meant revamping school curriculum, preferential treatment for those subject areas deemed most useful in the new economy, implementation of assessment instruments to measure the extent to which expectations are met, coupled with demands for fiscal responsibility, resulting in heavy budget cuts leading to reduction in support staff and resources. The previous government in Ontario assumed that only those teachers actually working in classrooms should be part of the education complement and were reluctant to count all the others who provide services of various kinds to students and teachers. Such adherence to neo-liberal thought rests on assumptions that what is no longer paid for from the public purse can be taken care of by the private sector. Hence, in the school systems examples of privatization, as seen through outsourcing of such elements as janitorial and food services, as well as curriculum consultants, and encouragement of partnerships with private companies to secure needed technology and school materials become much more evident. Such a climate has been well documented by Alan Sears (2003) as the commodification of the space of education itself. He has noted:

> Educational institutions are being openly commercialized through, for example sponsorships of various types that mark space as corporate. Administration methods are being reoriented towards competitive market models at every level. New regimes of user pay and testing are reversing educational entitlements that developed during the period of the broad welfare state. Finally, the context of education is being reoriented towards more practical and market-directed outcomes. (p. 210)

As for the "clients" of the system – the students and their parents, a spirit of libertarianism has been taking over. The curriculum is more demanding, so if students are experiencing difficulties, parents will have to pay for private tutors to help their children succeed. No concern was given to those who simply are not financially

able to meet the hefty fees charged by such tutoring services. Their recourse is likely to drop out of the system altogether; in Ontario it has been noted that drop-out rates are rising again after stabilizing in the mid-1990s. However, as it has become more evident just what is being lost in the new lean and mean reality, grass-roots movements have sprung up to protest the changes. One very effective group in Ontario, "People for Education," has been active in publicizing the amount of money now raised by parents to pay for supplies, textbooks, computers and library books. In their 2003 Elementary School Tracking report (People for Education, 2003a), they estimate that $38.5 million was raised in elementary school communities in Ontario in 2002–03 with the 10% of the schools in the wealthiest areas raising as much as 53% of those schools in less affluent regions. They are outraged over the large and growing number of children in the province in need of special education services and the drastic reduction in the numbers of designated special education teachers and classes, ESL teachers, librarians and specialist teachers for such areas as music and physical education (People for Education, 2002, 2003b, 2004). Their concerns are mainly for the mainstream students and what they have lost. But if mainstream students are suffering in the new school reality, how much more serious is it for the newcomers—immigrants and refugees. Studies cited above (Duffy, 2004a; Watt & Roessingh; 2000, Siegel & Gunderson, 2005) are confirming that the majority of immigrant and refugee students are not succeeding in Canadian schools. Because of the double whammy of introducing standardized high-stakes testing and more demanding curriculum at a time of fiscal restraint when the safety net provided by second language teachers and resource people has been removed, "ESL students often find themselves having to meet higher standards with less help" (Duffy, October 2, 2004).

In this paper it has been argued that the blame lies with the provinces, especially Ontario, British Columbia and Alberta, that have followed a neo-liberal agenda, one that has been in evidence in Alberta and Ontario since the 1980s. The document mentioned at the outset of the paper, *People and Skills in the New Global Economy,* prepared under the Liberal government in Ontario was one of the first signs of the changes to come in that province. But much of the blame must be laid at the feet of the Federal Government which has also promoted neo-liberal policies for at least the last 2 decades. In its efforts to eliminate the deficit the Federal Government has been making serious cuts to social programs and transfer monies to the provinces, and has downloaded costs once borne federally to provincial governments which, in turn have downloaded expenses to municipalities and citizens. The welfare state in Canada is no more.

With regard to immigrants which clearly are needed in Canada, policies have changed there as well resulting in harder times for newcomers. In post-industrial times and under the influence of globalization has come an emphasis on the need for citizens who can be active in the "knowledge-based society." Hence Canada actively recruits immigrants who can enter as so-called economic immigrants, that is, those who will bring at least $150,000.00 of investment into the country.

The other sought-after immigrants are those with professional credentials. However, once these highly qualified professionals arrive in Canada, they are likely

to find it very difficult to find permanent employment in their field of expertise because they lack Canadian experience and various gate-keeping organizations for the professions often refuse to recognize the foreign credentials of the new citizens.

The situation is particularly serious in Ontario for foreign-trained doctors, other health professionals and teachers, despite the fact that their services are needed. Ontario has a severe shortage of doctors, nurses and other health professionals. Unfortunately, the several thousand immigrants with foreign credentials in the area cannot get an Ontario license to practice, even after passing qualifying tests and taking additional courses in Ontario. The final step is the experience requirement that doctors must fulfill by completing a residency in an Ontario hospital. However, under the financial cuts to the health sector in recent years, hospitals cannot afford to open up enough residencies to meet the needs of Canadian trained and foreign trained doctors, and so the new doctors are unable to practice even though many communities desperately need and would pay anything to secure a doctor. Recently some new immigrants have begun to go public with their plight and threaten to sue the Canadian Government for false recruitment practices.

Labour market analysts Garnet Picot and Feng Hou recently completed a study published through Statistics Canada (2003) that shows a disturbing trend of a rise in low income rates among immigrants in Canada. Studying the period from 1980 to 2000, and focusing on years of peak cycles in business, they none the less found that while native born Canadians were experiencing growing prosperity, low-income rates were increasing for immigrants who arrived in the 1980s and 1990s. Although this cohort of immigrants was generally better qualified that those who came earlier, their low-income rates were higher than comparison groups who arrived earlier and who had a comparable number of years in Canada. Some of the problems Picot and Hou identified can be connected to the features of the new economy. That is, there were simply fewer full-time employment opportunities available as a result of downsizing and outsourcing. The jobs available were generally part-time contract work without benefits. Picot and Hou also noted the problems cited above of the difficulty in having foreign credentials recognized or even assessed, demands for Canadian experience that newcomers simply cannot obtain in a lean and tight market environment, and requirements for expensive retraining.

It is ironic that many of the immigrants who arrive in Canada are professional business people who share the ideas of the new right about the importance of entrepreneurship and self-reliance. They could contribute but are finding access into the system blocked. Canada is thus wasting human capital in a serious way.

In the report prepared by Andrew Duffy, he details the growing difficulties newcomers to Canada, both young and old, are facing in their efforts to succeed in their new country. He suggests that the problems may not just lie in the more competitive, leaner, meaner work environment, but may be affected by other factors. He offers a cautionary note by referring to the case of Holland, long considered a nation friendly to newcomers offering them many benefits and safety nets to ensure that they could live comfortably. Evidently the Dutch thought that the majority of the newcomers had come to Europe only temporarily to work in the booming

economy, but that eventually they would return to their homeland. Such has been the situation in many Western European countries with growing economies since the Second World War. However, now several generations of the guest workers are still in Western Europe and have no intention of returning to their homeland. Now they are asking for rights of citizenship and all the benefits that entails. As a result the atmosphere for the newcomers is not as open and friendly as it once was. Feelings have hardened towards the newcomers, many of whom come from different religious and racial backgrounds than the native Dutch population. The recent murder of a Dutch documentary maker by a person of dual Dutch and Moroccan citizenship has exacerbated the situation. Now it is openly debated as to whether the minority groups should be sent back the to country of origin of the original guest workers – even if the offspring of the original migrants know very little about their parent's native country, do not speak the heritage language, and Holland is the only homeland they have ever known. What seems to be operating in Europe and by extension in Canada where so many newcomers represent a population visibly different from the established inhabitants is systemic racism.

Duffy's observations reflect what Apple (2001) has reported in his recent book on education and the new right. He focuses on the coalition of right wing groups in the US, but also makes comparisons with England, New Zealand and Northern European countries. Apple has explained how the right-wing groups have influenced educational policy in the English-speaking world, where the discourse has shifted to embrace neo-liberal and neo-conservative beliefs and demands. But he also notes that even in the Scandinavian countries that in the past were more socially conscious, and more concerned with the well-being of the collective, the same trends have been noticed. He observes that the Western European countries, like the English-speaking world are seeing larger visible minority populations from Africa, the Near East, and Asia and asks whether a growing presence of racial diversity perhaps encourages a swing to the right in order to protect the values and traditions of the homogeneous white groups. One recalls his analysis of the new business and managerial middle class, and how they insist on demonstrations of accountability from schools, favour raising school standards, and having standardized testing, not only because that matches the rules of the market and competition that they live by, but also because they know that since the high-stakes tests will reflect the cultural capital and knowledge available to their children but not to those of lower socio-economic status, their children will be the winners and will face less competition in their efforts to advance and profit from the system.

Canada's largest cities include the greatest diversity of populations, and so perhaps the same agenda as described by Apple is encouraging the conditions that make it so difficult for newcomers to succeed. Canadian society is seeing growing disparities between a small but ever richer upper class, undermining the once comfortable middle class and positively devastating a disaffected and growing underclass made up of a disproportionate number of new Canadians. However, Canada will have to come to terms with diversity because it is here to stay and will only grow.

8.7 Conclusion

If Canada's goals to succeed in the global economy are to be realized, it will have to accept that it cannot afford the put obstacles in the way of the newcomers from all over the world that it has recruited. Provinces like Ontario need to lighten up on the draconian measures that have characterized the educational policies during the years of growth of neo-liberal thinking. The standardized testing program is too extensive and is not living up to its promise to improve learning – on the contrary. The financial restrictions placed on the schooling system were too severe, and are proving a detriment to the goals of educating our young people, and particularly our young immigrant students. The new curriculum is fine for some, but unnecessarily heavy and complicated for too many of our students. Issues of the inclusive curriculum, equity, and social justice are relevant here (Zajda et al., 2006). We need to rethink where we have been going and make adjustments where necessary. We also need to move back to paying more attention to the collective needs and well-being of average Canadians. To do anything less would betray what Canadians purport to stand for. But if we cannot bring ourselves to correct the mistakes made on humanitarian grounds, then we should act out of pragmatism; otherwise we are wasting valuable human capital and contributing to the ultimate failure of the system.

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Chapter 9
Globalising the Universal: Equity, Policy and Planning

Christopher Williams

9.1 Introduction

'Universal' provision has been nation-based, parochial, and abused for nationalistic purposes. This chapter critically assesses the 'universal' ideology and related human rights codes, and identifies emergent precepts for equity, policy and planning in a globalising world: *Global context* entails 'glocal subsidiarity' within nation-based administration, but greater international influence through service provision, service users and regulation, based on *educational best value. Regional provision* will increase, and *rolling equity* should ensure fairness across generations and borders. *Willing attendance* at school should become an indicator of school effectiveness. An *international right to education* entails states funding their citizens in other countries, and increased student mobility requires an *ethics of international study*. The notional *universal family* provides a better locus of education planning than the state or parental choice. The concept of *human/global security* links educational and international relations interests including the need to '*disarm history'*, precludes *unreliable global information*, and questions coercive inter-state intervention.

Governments have been more willing to accept international regulation of their armies and industries, than of their classrooms. There are now numerous international codes controlling weapons proliferation and war, and trade and workers' rights. But none to regulate school practice that fuels militarism, or college courses that teach how to exploit labour in less developed countries. Similarly, health regulations are accepted internationally, but there are no international requirements to teach about HIV/AIDS or other preventable diseases. International environmental standards protect the global commons, but schools need not teach the facts about environmental threats and there are no prohibitions on companies producing misleading educational materials. The few international codes that relate to education may have been influential but are usually not enforceable, except in the European Union (EU). The view of equity concerning war, trade, health and the environment now reflects the concept of global ('planetary') interests – that there are certain

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'vital' global interests that must take precedence over national interests (Graham, 1999). Yet the view of equity within education has been confined to the interests of the nation-state. And this has happened within a concept called 'universal' education.

Education has been the most parochial of the public service institutions. But the nation-based view of education is changing, and this presents new questions for planners and policy makers (Green, 1997). How, for example, does a national education system extend the principle of equity to people in other countries, and to international and cross-border families? How does it accommodate older and future generations? How can we ensure the quality of transnational education, and the recognition of qualifications globally? How is equity among education service providers, as proposed by the recent World Trade Organisation General Agreement on Trades and Services (WTO/GATS), to be reconciled with the interests of service users? How can these questions be conceptualised within clear precepts which accommodate equity in a globalising context?

In *Globalisation and educational reform: what planners need to know,* Martin Carnoy (1999, p. 46) concluded that globalisation 'tends to push governments away from equity-driven reforms', but also that 'this does not mean that educational policy cannot pursue equity driven reforms in the context of a globalised economic environment.'(see also Zajda, 2005). The assumption running throughout this chapter is that the key question is not now simply, what is equity? There is a broad international consensus about the basic principles, and that equity and efficiency can be reconciled (Davies, 1990). The more difficult ethical questions are: equitable for whom, when, where and why, in a globalising world?

This chapter does not provide a comprehensive discussion of the familiar equity issues, nor of globalisation. It identifies emerging practice that is becoming more relevant as the view of education becomes more global, and issues which are likely to affect policy-makers and planners in many countries in the near future. The starting point is to question the 'universal' ethos of education provision that is in reality parochial and nation-based, and then to consider the strengths and weaknesses of relevant international human rights agreements. The argument is not that we should dispense with nation-based systems. It is that policy and planning should now acknowledge the context of a globalizing world in order to maintain equity, and that the resultant increased plurality of education provision and regulation could help to avoid the problems caused by the misuse of nation-based systems for nationalistic purposes during the past century. The principles of international relations should become more central to education policy and planning, and vice versa. The chapter then identifies emergent precepts for policy-makers and planners, which can help to guide this trend.

9.2 'Universal' Provision

When state systems of education emerged in Europe, from the middle of the 18th century, the general intent was that provision should be fair and 'universal' (Green, 1990). The state would ensure an acceptable minimum standard of schooling for

every child within its national borders. This entailed either creating a total, centralised secular system, as in France and Japan, or by the state filling in the gaps left by church and other private schools, as in Britain. But this 'universal' ideology contained a smuggled assumption - that nations were to compete and not co-operate in terms of education provision and outcomes, just as their armies and industries did. Yet there was no ethical or educational justification for this. The 'universal' ideal also seemed to assume that education concerned only children and young people.

9.2.1 State Systems – Nation-Based Equity

One of the undesirable outcomes of nation-based 'universal' provision over the past century has been the ability of political leaders to use education systems to fuel war and other social conflicts (Davies, 2004, 2005). This happened in the contexts of Nazi Germany, Meiji Japan, Apartheid South Africa, segregationist America, and the Cold War (Williams, 2001, pp. 119–131), and has occurred more recently in the Balkans, Rwanda (Bird, 2003), and within some forms of Islamic schooling. Many of these systems displayed exemplary equal opportunities practice – but only in relation to a particular population. Hitler's schools were one example (See Fig. 9.1.). The accompanying aim that education should function to enhance national competitive advantage in the commercial sector, through the production of national 'human capital' (Ashton & Green, 1996), has also been taken for granted. Yet this is also intrinsically confrontational, and self-defeating in a globalising world (Davies, 2005). In contrast, the aim of a public health service is to create a healthy population, not a population that is healthier than in other countries, and international co-operation is common (Graham & Williams, 2002). So why should the purpose of an education system be to create a population that is more educated than elsewhere, with the implicit ethic of non-cooperation and competition? And whatever the ethical

Each district shall have its Adolf Hitler School, this institution being the first stage in the training for a future Fuhrer career…The schools will train boys between the ages of twelve and eighteen. They will selected from the mass of the people without regard for social position, financial status, etc…These young aspirants are tested and again selected by the district authorities to be ready to pass a final examination featuring perfect health and good physical condition. Not even the slightest health deficiency will be tolerated. Six hundred scholars for each school, making four thousand altogether, will be trained for coming Fuhrers. Their education is free of charge, the party assuming the main cost of living, i.e., clothes uniforms, books as well as pocket money…The Adolf Hitler Scholar is also obliged to join the Hitler Youth.

Frankfurter Zeitung, November 24, 1937.

Fig. 9.1 Equal opportunities – The Adolf Hitler-Schule

arguments many factors, including international labour mobility, in the modern world mean that it is now virtually impossible to calculate honestly a national 'rate of return' on educational investment (Forojalla, 1993, p. 143). The idea that the nation was the 'universe' within education ideology was hardly questioned, yet history shows that on an international level it has been one of the most divisive institutions of the past century.

9.2.2 Regional Provision – Cross-border Equity

There are many emergent initiatives that challenge the idea of 'universal' as meaning nation-based school education. One of the most convincing arguments is that there is no educational reason why provision should not be conceived as region-based, instead of national. In settings such as Central and Eastern Europe, Central Africa or Central Asia, the nearest educational facilities for communities living near national boundaries are often just across a national border. The particular border may be recent, and imposed by colonial or super-powers, as in the Middle East, Africa or Korea. Indigenous communities and families may be split across borders, and forced to learn separate languages and values through the schooling system. In settings such as Northern Thailand, where indigenous hill tribes are split across borders, educational principles would propose that multi-lingual cross-border schooling would be most equitable and efficient. But there are robust policies to ensure that the Thai curriculum is used and that the Thai language is the medium of instruction. In border regions throughout the world, 'universal' education often uses children as barbed wire.

Nomadic communities provide another dimension, and there are many surprising contrasts. In Uganda, for example, there seems little difficulty to recognise the right to education of the Karamojong – the nomadic cow-herders of the North East region who cross intra-national boundaries – by supplying teachers who follow those tribes and provide a relevant cow-centred education (Oryema, 2004). But Europe finds it more difficult to accommodate the educational needs of its Roma (Gypsy) population. The Roma have now declared themselves a 'non-territorial nation', and argue that this pan-European identity is simply a progressive form of the European ideal. Yet in many European countries the main sources of a viable education for Roma children are the special needs schools (Igarashi & Williams, 2001, p. 11).

The *Council of Europe* concept of Euroregions provides an example of accommodating the cross-border nature of service needs, and the cross-border identities of communities and families (CoE, 2004). The Council reminds us that in ancient Rome the notion of "*Regio*" was used for demarcating an area for practical purposes, not for governing it. A Euroregion links adjacent, or even non-adjacent communities, which have a common interest, such as the communities either side of the English Channel Tunnel, or fishing communities along a cross-border coastline. Those common interests could include education, and more formal recognition of cross-border regions has applicability for education planning throughout the world.

Regional provision might be particularly pertinent to bi-lateral and multilateral development aid, which currently often increases inequity between nations (see later).

9.2.3 Separatist Provision – Group-Based Equity

Private and faith-based provision competes with state schools in most countries. Increasingly this transcends borders ideologically or corporately, but it is divisive within a nation. Traditionally, those administering state schools complained that non-state schools "cream off" high ability pupils. But as private schools represent an invisible subsidy of state provision, governments usually tolerate them. The state argument is that, if wealthy parents pay fees then across the whole nation, the outcome is better provision for less wealthy families, and also that faith-based provision recognises mobility and the cross-border identities of families. All sides of the argument are based on views of equity.

Private universities and colleges owned by companies in other countries are seen as more problematic. These institutions often only provide the cheaper subjects, such as business management and languages, leaving the state to pay for expensive subjects such as medicine and engineering, which were previously subsidised by the cheaper subjects within a national university system. But another argument is currently more muted, that these organisations can present a vehicle for extending good provision and practice more 'universally', across the world. For example, the American Universities in countries such as Egypt and Lebanon, and the Post-War International Christian University in Tokyo, have been influential models of good international practice over the past century, without overtly promoting western imperialist ideology or compromising other universities.

Related to these arguments are demands from parents from particular social or religious groups to provide segregated schools, within a 'universal' system. Separate provision is also rationalised in terms of equity, for example on the basis of language, as in Sri Lanka, or religion as in Northern Ireland. But even on its own terms, this raises a demographic problem of equity. It might be agued that it is fair to provide Muslim schools in Europe's cities, on the grounds of acknowledging the increasing mobility of faith-based communities and their differing claims about teaching 'universal' truths (BBC, 2004). But is that provision truly equitable if it cannot also be done in sparsely populated rural or coastal regions in the same country?

Although often rationalised on the bases of fairness, the structure of separate schooling is usually little different to that of the old segregated school systems of apartheid South Africa or the USA. How can any form of segregation be reconciled with the UNESCO ideal of 'Education for International Understanding', or the UNESCO Convention on Discrimination in Education, and global ideals to achieve a more equitable world through peace and harmony? The outcome of segregated provision in Kosovo in 1998 is just one of many examples of how this policy has the potential to fuel conflict. It is a shame that politicians did not have Robert Fisk's historical awareness and prescience (see Fig. 9.2).

Albanians get ready for war with the Serbs

Robert Fisk

…Some years ago, Serbs and Albanians went to school together and had little trouble forming friendships. But after more than seven years in which the Albanians have boycotted the Serbian state and set up their own parallel institutions, the word "Serb" has become synonymous with "enemy". Nearly all adult Albanians can speak Serbian, but a new generation of Kosovo Albanian children who have never attended state school in now growing up resolutely monolingual…

The Independent, March, 1998.[1]

Fig. 9.2 Segregation in Albania

9.2.4 WTO/GATS – Equity for Service Providers

The WTO/GATS agreements present a novel dimension to the equity arguments – that fairness must now extend to education providers through removing protectionist barriers and permitting service providers to bid and compete across nations. This idea generated considerable criticism (People and Planet, 2000), yet the critics do not reconcile their views with Article 29(2) of the *UN Convention on the Rights of the Child*, which precludes interference with 'the liberty of individuals and bodies to establish and direct educational institutions…' It was feared that GATS would lead to further inequity within less developed countries, and that students may only have access to forms of provision that are 'best value' in the simplistic terms of a monetary tender, rather than educational or social 'best value'.

Schugurensky and Davidson-Harden (2003, 2005) argue that GATS could affect the sovereignty of Latin American countries (Schugurensky & Davidson-Harden, 2003, pp. 321–357). But is external influence on sovereignty always a bad thing? There are countries that might benefit from a challenge to the way in which they use education for nationalistic purposes – North Korea, Iran and the USA for example. In 2003, Norway tried to gain access to the South African education market, but backed down because of opposition from the education minister Kader Asmal (Jobbins, 2003, p. 11). Yet if Norway, or South Africa, had exercised influence within the Rwandan education system 2 decades earlier, it may not have been used to fuel the subsequent genocidal conflict. Whatever the outcome of the GATS agreements, they represent a groundbreaking example of the implementation of equity on a global scale, albeit among service providers not service users. And globally some of the unplanned outcomes of plural provision might be more beneficial than the intended ones.

Again, the other side of the argument is more muted – that some regions might suffer discrimination. There will be great interest to provide services in 'open door' urban China, but not in the poor rural regions. And countries such as Somalia and

Sudan will not even be considered, yet they would probably benefit greatly from external investment in education, irrespective of its immediate shortcomings. There have certainly been examples of international education provision that are very questionable, mainly from missionary organisations and industrial companies. But there are also examples that have been accepted as beneficial for decades, such as the language schools of the Goethe Institute, Institute Française, and the British Council, and bilateral aid agencies such as Oxfam, Save the Children, SIDA, and JICA. There is nothing intrinsically wrong with encouraging a plurality of education providers across borders. The important questions are what do they provide, how and why?

9.2.5 The 'Less Developed' Countries – Equity and Aid

After World War II, the newly independent nations followed the same path as the more developed nations, by attempting to transform partial colonial education provision into 'universal' systems. The failure to achieve provision equitably throughout the world led to the need to restate the universal ideal under the banners of 'Universal Primary Education' (UPE) (Forojalla, 1993), and 'Education for all' (EFA) at the Jomtien conference in Thailand in 1990, and through the less known UNESCO *Salamanca Statement* (1995) which extended the idea of EFA to disabled children and recognised social exclusion in 'developed' countries. EFA was then reaffirmed at the Dakar Education for All conference in 2000 (UNESCO, 2000).

At Dakar, many NGOs argued for a 'Global Action Plan', and others mentioned a 'Global Compact'. The proposals may have had an influence on national governments, but there are no global agents that can implement these ideas as international policy. Nevertheless, politicians from the richer countries seemed to accept a new global equity ethic: that no nation should be unable to meet its responsibility to provide basic education because of a shortage of money. But in practice this new ethic contained a caveat, that the beneficiary nation should display 'good governance' before aid is provided.

This may be realistic, but it also further increases regional inequity between people in favoured countries such as Botswana and Kenya, and collapsing states such as the Republic of Congo and Somalia. Logically, a truly equitable aid policy would provide greater resources for the countries with the least good governance, including assistance to remedy bad governance. This would be a more ingenuous reflection of Article 23.3 of the Children's Rights Convention, which requires, without qualification, 'the elimination of ignorance and illiteracy throughout the world'. One of the outcomes of inequitable service provision between countries is 'service refugees', who migrate across borders in search of better provision. Regional cross-border service provision (see above) can help to create service buffer zones to mitigate this problem. One model stems from Southern China in the 1980s, where a 'special economic zone' was created to buffer the potential rush of migrants to Hong Kong following its return to Chinese administration, and this

included schools that were considerably better than those in most of China at that time.

A regional, instead of nation-based, view of international aid could address many problems, including local factional conflicts. Cross-border support for the education of nomadic people around the Kenya–Uganda border would be one example, or in relation to the whole Lake Victoria region. But the present move towards 'sector funding' increases government control on education in the less developed countries, at a time when governments are relinquishing their controls in the richer nations. The current policy hardens rather than softens borders, and fuels nationalistic competition and conflict.

9.3 Human Rights

The UN *Declaration on Human Rights*, the *Convention on the Rights of the Child* and similar statements codify universal provision and equity internationally (see Fig. 9.3). The Convention is seen as particularly important, and it is recognised as one of the most successful UN instruments. It stemmed from a remarkable international consensus, and the monitoring and implementation structures are proving very effective (Hodgkins & Newell, 1997). Only two nations did not sign – Somalia which did not have a legitimate government, and the USA.

But, as happened within the notion of 'universal' education, the Human Rights statements assume that education is to be nation-based, yet no code expressly gives nations the right to control education. More problematically, Article 29 of the Children's Rights Convention holds that education should encourage '*the development of respect…for the national values of the country in which the child is living, the country from which he or she may originate…*'. Did the UN really intend to encourage respect for all 'national values', irrespective of what those values are, including regimes that might equate with Nazi Germany (See Fig. 9.4)? How do we explain to young asylum seekers that they should respect the values of the country from which they 'originate', which has been persecuting them?

9.3.1 The Compulsory Right

When translated into national legislation, education becomes a compulsory right – a unique form of enforced equity. Even the right to life can now be interpreted to include a right to terminate ones' own life, if it seems intolerable or not worthwhile. Euthanasia is increasingly accepted, and countries no longer make suicide a criminal offence. But the right to education does not yet include the right to decline education on the same grounds. The construction of education as a compulsory right may be inevitable, but research can address the main resultant problem, that we do not know whether the direct service users think it

United Nations Declaration of Human Rights. Article 26. (1948)

1. Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible on the basis of merit.
2. Education shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, racial or religious groups, and shall further the activities of the United Nations for the maintenance of peace.
3. Parents have a prior right to choose the kind of education that shall be given to their children.

European Convention of Human Rights. First Protocol, Article 2 (1950)

No person shall be denied the right to education. In the exercise of any functions which it assumes in relation to education and teaching, the State shall respect the right of parents to ensure such education and teaching in conformity with their own religious and philosophical convictions.

UN Convention on the Rights of the Child. Article 28,29 (1989)

1. States Parties recognise the right of the child to education, and with a view to achieving this right progressively and on the basis of equal opportunity, they shall, in particular:

   a) Make primary education compulsory and available free to all;
   b) Encourage the development of different forms of secondary education, including general and vocational education, make them available and accessible to every child, and take appropriate measures such as the introduction of free education and offering financial assistance in case of need;
   c) Make higher education accessible to all on the basis of capacity by every appropriate means;
   d) Make educational and vocational information and guidance available and accessible to all children;
   e) Take measures to encourage regular attendance at schools and the reduction of drop-out rates…

2. States parties shall promote and encourage international co-operation in matters relating to education, in particular with a view to contributing to the elimination of ignorance and illiteracy throughout the world and facilitating access to scientific and technical knowledge and modern teaching methods. In this regard, particular account shall be taken of the needs

(Article 23)

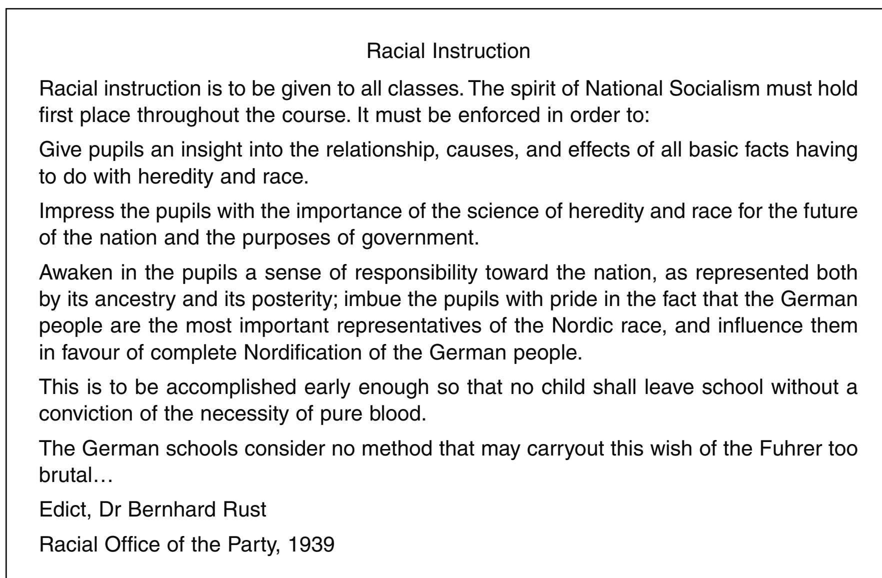
3. Recognising the special needs of a disabled child, assistance…shall be provided free of charge, whenever possible…and shall be designed to ensure that the disabled child has effective access to and receives education, training, health care services, rehabilitation services, preparation for employment and recreation opportunities in a manner conducive to the child's achieving the fullest possible social and individual development, including his or her cultural and spiritual development.

(Article 29)

The education of the child shall be directed to…

b. the development of respect for human rights and fundamental freedoms.
c. the development of respect for the child's parents, his or her own cultural identity, language and values, for the national values of the country in which the child is living, the country from which he or she may originate, and for civilisations different from his or her own.
d. the preparation of the child for responsible life in a free society, in the spirit of understanding, peace tolerance equality of sexes, and friendship among peoples, ethnic, national and religious groups and persons of indigenous origin.e. the development of respect for the natural environment.

Fig. 9.3 Human rights and education



Racial Instruction

Racial instruction is to be given to all classes. The spirit of National Socialism must hold first place throughout the course. It must be enforced in order to:

Give pupils an insight into the relationship, causes, and effects of all basic facts having to do with heredity and race.

Impress the pupils with the importance of the science of heredity and race for the future of the nation and the purposes of government.

Awaken in the pupils a sense of responsibility toward the nation, as represented both by its ancestry and its posterity; imbue the pupils with pride in the fact that the German people are the most important representatives of the Nordic race, and influence them in favour of complete Nordification of the German people.

This is to be accomplished early enough so that no child shall leave school without a conviction of the necessity of pure blood.

The German schools consider no method that may carryout this wish of the Fuhrer too brutal…

Edict, Dr Bernhard Rust

Racial Office of the Party, 1939

Fig. 9.4 Respect for national values, Germany (1939) (From Mann, 1939)

is worthwhile. No government has yet had sufficient faith in the quality of its education provision to carry out a simple national survey to find out how many children *willingly* attend school, yet this would probably create national and international league tables that are both cheaper and more pertinent than those currently available, such as the American-led TIMSS maths and science study (TIMSS, 2004).

9.3.2 'Free to All' – But Where?

Usually under state legislation, this compulsory right is framed in terms of 'education' not 'school attendance'. This accommodates tuition elsewhere, for example at home, in hospitals or prisons, in royal palaces, or for nomadic or traveller families. But we could soon see an argument to extend this principle – that the state pays for the education of its citizens anywhere - to children who work and travel internationally with their families and to cross-border families, particularly if those families have paid taxes in their home country. The practice is already established in terms of diplomats and the military, so why should it not apply equitably to other tax-paying citizens? Surely a commercial or cultural presence aboard benefits a home country too. Within the *Convention on the Rights of the Child,* 'States Parties… shall..make primary education compulsory and available free to all.' (Art.28.1a).

There are no caveats about where. The argument here is not the same as that used by wealthy parents who want governments to pay for private education. It is that, for many international families, no schooling equivalent to the state provision in their home countries is available without paying fees or travel and boarding costs. The usual incompatibilities concern medium of instruction, consistency of curriculum, and recognition of exams. The so-called 'international right to free education' is, in reality, just a nation-based right – it is not yet extended to a nation's citizens in another country. That parochial interpretation finds no support in international codes.

9.3.3 'Discrimination of Any Kind' – for Whom?

The question of equity is addressed directly in the UNESCO Convention against Discrimination in Education (Article 3.a) – states must undertake to '*abrogate any statutory provisions and any administrative instructions and to discontinue administrative practices which involve discrimination in education.*' But, at face value, this might preclude segregation on the grounds of language to allow effective teaching for immigrants, schooling for children with specific disabilities that cannot be addressed in mainstream settings, or other forms of segregation that are broadly acceptable. For example some of the current education projects for Roma people in the Czech Republic are much better than the mainstream state schools and represent a pragmatic short-term solution to racism and discrimination against the Roma.

There have been many attempts to address the conflicting aspects of non-discrimination. The Permanent Court of International Justice concluded in the Minority Schools in Albania case in 1935 (note the date) that: '*equality in law precludes discrimination of any kind; whereas equality in fact may involve the necessity of different treatment in order to attain a result which establishes an equilibrium between two different situations*' (Hall, 1997, p. 214). The UK Race Relations Act (1976) gets around the problem pragmatically by assuming that segregation entails less favourable treatment: '*Segregating a person from other persons on racial grounds is treating him/her less favourably than they are treated.*' Current international ethics links two elements, discrimination *and* disadvantage, in the determination of what discrimination entails, and increased mobility presents this as an important standard. Not least, globalisation analysts such as Ulrich Beck point out that the number of cross-border families is increasing rapidly (Beck, 1997). In Germany, for example, bi-national marriage had increased from one in 25 in 1960, to one in seven by 1995.

But, as with the understanding of 'universal' education, the unspoken parameter was that the rules of non-discrimination only apply to citizens within national borders. Increasing migration now challenges that assumption, and presents phrases such as, '*precludes discrimination of any kind*' as increasingly challenging. Contradictions abound. If immigrant children arrive in a country 'illegally' with

their parents, they are likely to be returned home. But if they are unaccompanied, this is often not possible and they are very likely to receive free welfare and educational services, even if less good than the national norm. Nation-based policy, in effect, encourages parents to abandon their children. In the USA alone, this circumstance now applies to 5,000 children a year. In practice, but invisibly, the principle of non-discrimination is now expanding beyond a nation's citizens. It will take a courageous government to admit this reality, yet education planners will have to accommodate those invisible children.

9.3.4 International Student Mobility – Equity Anywhere?

The increase in student mobility has raised the question of non-discrimination internationally, and there are many contradictions, again usually stemming from the nation-based view of education provision. For example, English and American universities usually have English language requirements for students from other countries, but not for 'home' students, yet both may use English as a second, or first, language. Access problems and disabilities must be accommodated for home students, but equal opportunities polices rarely address the specific special needs of students from other countries, for example by ensuring appropriate transport from an airport. A British student who has difficulty writing essays because of dyslexia has a statutory right to help and support. A student from outside Britain, who has difficulty writing essays because she is Mongolian, does not. However, informally that aspect of language support is increasing, and soon it will probably be an expected right.

The recognition of qualifications is one area in which there are practical measures to globalise equity (Little, 2000). The *Lisbon Convention on the Recognition of Qualifications concerning Higher Education in the European Region* was developed by the Council of Europe and UNESCO in 1997 (LC, 1997), and similar measures are being developed to harmonise school qualifications across Europe. This is being taken forward in proposals for a Europass, which will create an EU CV with a standard presentation of qualifications, recognised training, language profile and cultural experience (Nuthall, 2004). There are other examples of global qualifications, for example English Language tests for international university students, international driving licences, and the so-called 'international driving licence' for ICT skills. But an inevitable outcome is a further devaluing of qualifications from countries that are not part of these international trends.

Split-site universities provide another dimension. For example the British University of Nottingham now has a campus in China, and students are therefore able to obtain an English university degree without leaving their country. Conversely, developments in information and communication technology (ICT) permit courses to be developed and run jointly across universities in

different countries (Mason, R., 1998, p. 143), which can give students a choice of where they would like to be accredited. The globalisation of accreditation appears exciting, but the resultant confusion can mean an artificial inflation of the status of 'known brand' universities, such as Harvard and Oxbridge, simply because it is hard to judge the value of innovatory, perhaps better, international qualifications.

The increase of student mobility (Blumenthal, 1996) also proposes an area of omission in international codification, because international and cross-border students are uniquely vulnerable and have little power to make formal complaints. Abuses of international students include bribery and demands for sexual favours to pass exams, failures to provide promised courses and supervision, and exploitative fees and unreasonable hidden charges for accommodation or other necessary services. Even if students' complaints are successful this sets up a *Catch 22*, because it could reduce the status of the institution or department in which the students are based, and therefore the status of their qualifications for which they will have made a considerable financial, emotional and life investment. This problem presents a clear role for UNESCO, to determine a code of ethics for international and cross-border students, of all ages. We might also see the anti-corruption NGO, Transparency International (TI), contributing an international 'Education Corruption Index'. There would certainly be no shortage of students willing to provide data, and the anonymity of TI's innovative methodology would give them protection. The UNESCO-CEPES/Council of Europe *Draft Code of Good Practice for the Provision of Transnational Education* (2001) sets a relevant precedent, although it only concerns distance programmes 'in which the learners are located in a country different from the one where the awarding institution is based.'(TE, 2001).

9.3.5 Parents and Children, or Families and 'Rolling Equity'

Currently, the only effective internationally-agreed check on education is to be provided by parents, and that is taken only to apply to schools. The UN Human Rights Declaration (Art. 29.c) states that, '*Parents have a prior right to choose the kind of education that shall be given to their children*.' The International Covenant on Civil and Political Rights elaborates, expecting States to '*respect for the liberty of parents…to ensure the…moral education of their children in conformity with their own convictions* (Article 18 4). The UN Convention on Discrimination in Education is similar. And the idea is affirmed in the European Human Rights Convention (First Protocol, Art. 2):

> In the exercise of any of its functions in relation to education and to teaching, respect the right of parents to ensure such the State shall education and teaching in conformity with their own religious and philosophical convictions.

The difficulty that this raises is that it can justify exclusive, sectarian, racist or fundamentalist schools, if these are 'in conformity' with parents' wishes. And again, the assumption is that this ethic operates within, not across, nation states, and only applies to schools, despite referring to 'any of its functions…' in education and teaching. Would parents in a European country have the right to demand that a government pays for the education of their children in a school just across a border, on the basis of a 'philosophical conviction' that the school is nearer and transport use should be kept to a minimum to mitigate global climate change?

In some countries, parents are gaining more choice about which state school their children attend, but this personal equity is not easy to accommodate within the universal ideal. Although politicians like to promote the rhetoric of choice, the consequence is that less popular schools can quickly become "sink schools", attended largely by pupils with social problems, and increasingly by immigrants including refugees. In the context of increasing international mobility, many major cities are now the locus of a significant polarised inequity among international families. Children who cross borders because their parents are escaping from persecution often have a less adequate education than the norm, while those who cross borders under the aegis of a Trans-national Company or diplomatic mission can gain access to education that is far better. These children may originate from the same country, even the same city, in which their families were of equal social standing.

Parent power also raises questions of intergenerational equity, and the necessity of 'lifelong-learning'. Given control over spending in local schools, most parents will opt for short-term projects which benefit their own children, not the intangible long-term needs – new PCs will usually be favoured more than roof maintenance. The increasing 'special needs' requirements of older people present another intergenerational argument, and this is pressing in countries such as Japan where half the population is now over 60. Mental conditions associated with aging, such as dementia, often require educational interventions in later life to permit a better quality of life. Other acquired disabilities may entail ICT or other training - people who acquire sight impairments for example.

Other 'special needs', such as those of people whose lives have been disrupted for political reasons, introduce related questions, for example the generation affected by China's Cultural Revolution. Is South Korea budgeting for education in the context of reunification? This will not only require large cash inputs into the North, but also a re-education of its own citizens who were taught cross-border hatred at state schools, including the idea that North Koreans were red pigs. From the experience of Germany, rich sector citizens are not intrinsically willing to help their disadvantaged cross-border compatriots. The state needs now to ensure 'rolling equity' across generations and regions, yet the current reality is that the relevant government officials are usually not even in the same government department. They are split across offices dealing with school education, higher education, further education, welfare, justice systems, or health. 'Joined-up government' is necessary, to ensure joined-up equity.

Codes that stress parental rights assume that all children have decent parents available to exercise these rights. In some cases parents have died or abandoned their children. Street and working children and AIDS orphans may not have parents immediately available, and nor will unaccompanied refugees or immigrant children. It is not always clear whether adoptive or foster parents, family members within traditional extended family networks, or child-headed households can assume parental powers. If education practice does not acknowledge the absence of parents, or bad parents, children with the least power will be further disadvantaged. The concept of life-long learning and aging populations brings another dimension. Not many octogenarians will have parents available to help them achieve their educational rights. What about the quality of parents? The European Convention requires that education should encourage 'the development of respect for the child's parents' (Art. 29c.). Is that rational if the parents are child abusers, paedophiles, drug dealers or international criminals, or for the children of figures such as Pinochet, Eugene Terre Blanche, Osama bin Laden or US Presidents? The centrality of parents to human rights in education is no better than the centrality of nation states.

'Universal' systems extended the idea of equity to the rights of all apparent stake-holders to have a degree of power over schools. Usually this includes parents, the local community, and state, for example within Britain's 1944 Education Act. It is arguable that teachers should not be equal stakeholders, as they are employees, but why are children omitted? The idea of children as stakeholders is reflected in the UN Convention on the Rights of the Child (Art. 2):

> State parties shall assure to the child who is capable of forming his or her own views the right to express those views freely in all matters affecting the child, the views of the child being given due weight in accordance with the age and maturity of the child.

The education policy in post-apartheid South Africa has reflected this since 1995, and requires Student Representative Councils in schools. Meanwhile in Britain, this concept was seen as relevant to all services for children – except education. The result was that a child murderer in a secure unit would have the right to express a view about his/her education, but the head girl of a catholic convent school would not. But however power is allocated to children, there is no reason to believe that the views of children will be any less self-serving than those of their parents.

The idea of 'parents' or children as the locus of educational equity might be better expressed in terms of 'families', and the UN Human Rights Declaration and many related codes, reflect that idea. Every child, and therefore every human being, has a family of some sort - be it single-parent, gay, genetic, child-headed, biologically engineered, adopted, institutional (e.g. orphanages) or chosen. The concept of the family is also intrinsically intergenerational. Equity in terms of a notional 'universal family' embodies concepts such as peer equity (e.g. gender, race, disability), intergenerational justice and 'rolling equity' (future generations and elders), and the cross-border international and supra-national identities of families. If education provision were conceived as being fair to the 'universal family', many of the conceptual conflicts might be easier to resolve.

9.3.6 Global/Human Security – Linking Education and International Relations

More broadly, international codes propose that survival in a modern world depends on maintaining equitable human and global security through educating for international understanding, tolerance, peace, and protecting the environment (Williams, 2000). This new view of security is well defined by Paul Stares (1998):

> The concept of global or human security represents, therefore, both a *horizontal* extension of the parameters of security policy to include an even larger set of problems, such as poverty, epidemics, political injustice, natural disasters, crime, social discrimination, and unemployment, as well as *vertical* extension of the traditional referent object of security policy to above and below the level of the nation state.

At a conference on ‘Education, equity and security’, Amartya Sen (2003) argued that ‘illiteracy itself is a human insecurity’ and he has re-conceptualised the usual education and equity issues within the notion of human security.

An equitable view of human/global security would preclude forms of education in one nation, which might lead to harm in another, and there are now small but significant expressions of this ethic. In Russia, the supreme mufti Ravil Gaynutdin has stated his concern about Islamic Colleges that are promulgating the teachings of Wahabism. This 18th century movement calls on its followers to treat all other Muslims as enemies (Lane, 1904). Current textbooks teach that anyone who is not a Wahabi should be killed (Rich, 2000, p. 11). Some of Pakistan’s *madrassahs* have been criticised along similar lines. Sami-ul Haq, the head of the Darul Uloom Haqqani, one of the top Islamic seminaries, was said to be proud to have produced some of the ‘top leaders of Afghanistan’s repressive Taliban militia’, including interior minister Khairule Khairkhwa, and the head of the feared religious police, Qalam Uddin. Reports from Peshawar, Pakistan, told how young boys were taught to ‘Pray for the destruction of the West, pray for the West to be divided into pieces so that it can be attacked, just as the West has done to Islam.’ (Calton, 2001, p. 60). The US expressed its concern to Pakistan’s government, but it is hard to outlaw Koran schools (McCarthy, 2000, p. 6). The obvious question this raises, within the ethic of reciprocity, is about nationalistic teaching in US schools, and the justification of causing harm within Islamic countries outside the US through military intervention.

Disagreements concerning a Japanese school textbook show that national leaders now take education in neighbouring nations very seriously. In 2001, the Japanese government approved a history textbook – *Atarashii rekishi kyokasyo* [New history textbook] – which was considered too nationalistic outside Japan, because it glorified Japan’s occupation and gave an unclear account of events. The outcome was a formal protest from China, the recall of the South Korean ambassador, the partial suspension of military relations by Korea and threat by its parliamentarians that they would block Japan’s plans to join the Security Council. According to Korean diplomats the book was ‘rationalising and glorifying Japan’s wrongdoings based on a self-centred interpretation of history.’ Korean

students achieved a successful 'cyber-attack' on the Japanese website containing the text (Parry, 2001, p. 14). The problem might not have arisen if regional history in both countries had been taught in a way that acknowledged that most of the Japanese population has Korean ethnic roots, the present Emperor has recognised this within his own family, for most of the past 2,000 years there have been mutually beneficial relations between the two countries, and that the present South Korean education system was based on the system created by the Japanese. Similarly, in the Balkans, textbooks have promoted the history of the 'Bulgar lands' to vindicate Bulgarian nationalism. But the texts were based on events several centuries before the country of the Bulgars came into existence (Donkova, 2000, pp. 8–9). Israeli politicians have complained that some Arab language school books in Palestine include maps of the region which do not show the existence of the State of Israel. They pointed out that this can fuel divisive attitudes. Yet during the same period, Jewish academics were trying to block the publication of research which showed that generically Arabs and Jews are of the same Semitic origins.

UNESCO has called on governments to 'disarm history' (UNESCO, 2001). This could be achieved through policies that ensure that a comprehensive factual history of a region is constructed through regional collaboration, in the way that Development Education Centres in Britain create educational materials about international development relations (TIDE, 2004). This is not difficult. Teachers in the countries or regions that share a common interest or history collaborate, together with relevant experts, to create materials that are agreeable to all parties. A broader formal concept is that 'unreliable information' – information that is false but purported to be fact, and is potentially harmful – is precluded in any educational material (Williams, 2001, pp. 111–119).

Linked to the question of history are concerns about access to information and the 'digital divide' between developed and less developed nations. Rights to freedom of information and knowledge are enshrined in many recent international codes, and stem from the UNESCO Constitution (1946) which aims to '*promote the free flow of ideas by word and image*' to advance '*mutual knowledge and understanding of peoples…*'. China, for example, has moved dramatically over the past 10 years from trying to control the internet through a single government gateway, to encouraging its use nationwide for educational purposes. But this freedom of information should not be seen solely as an equity issue in the less developed regions. In is equally important, for example, that children in American schools in Arkansas have the freedom to learn about the mainstream view of evolution. In 1929 the Arkansas and Mississippi Education Authorities banned the teaching of evolution, and the courts have argued over this ever since. In 1999, the Kansas board of Education inserted 'creationism' into the school standards on science (MacKenzie, D. 2000, p. 35). This goes beyond a curriculum nicety. If children do not understand the evolutionary process, they cannot understand that current anthropogenic environmental change is radically altering the environment in which human beings have survived progressively for 3 million years, and therefore that survival is now threatened.

The US intervention in Iraq, in 2003–4, raised another significant question. What are the criteria for educational intervention across borders? Saddam Hussein's regime was initially criticised by the US for using its education system to promote its own dubious values, and for social control (Monaghan, 2003, p. 10). From some perspectives, the US-led intervention was seen as progressive – if human security was being compromised by despotic regimes, international intervention was necessary and legitimate, and this could include intervening in education provision. But events did not follow that line of reasoning, and quickly became the violent imposition of one nation's values on another nation. Whatever the arguments about its curriculum and social control, the Iraqi regime had achieved greater equity of access to education than many other Arab nations. Education was free up to university level, and 40% of University students were women (Astewani, 2003, p. 21). Before the Gulf War, the literacy rate was 81%, but after sanctions were imposed it fell to 53% (Walters, 2003, p. 9). The invasion and occupation left thousands of children and students without access to schools and universities, and traditional controls on women's education returned.

Can nations use the equity argument to impose their own particular set of values throughout the world, under ideologies such as "freedom" or "democracy"? Writing with great prescience in 1972, George Santayana prophesied:

> The authority that controlled universal economy, if it were in American hands, would irresistibly tend to control education and training also. It might set up…a cultural department, with ideological and political propaganda. The philanthropic passion for service would prompt social, if not legal intervention in the traditional life of all other nations, not only by selling there innumerable American products, but by recommending, if not imposing, American ways of living and thinking. (Santayana, 1972, p. 459).

He predicted what Americans were to do 30 years later in Iraq, through a US company called *Creative Associates International*, (Usborne, 2003, p. 10; CAI, 2004a), the training of teachers, and the dissemination of 'appropriate textbooks' by the US International Development Agency (Usborne, 2003, p. 9). No other country was permitted to tender for providing school education. When asked 'what legitimises American intervention in the education systems of another country', the reply from Creative Associates was:

> We do not have an 'official line'. Working directly with children and families in Iraq, and, in a spirit of partnership, and with the Ministry of Education we can point to demonstrated progress in teacher training, accelerated learning, and the delivery of school supplies. Through our program of grant making and the development of school committees Iraqis have taken ownership of their secondary schools. We are honored to have had the opportunity to serve the Iraqi people under the USAID/RISE Project (CAI, 2004b).

The work of USAID and Creative Associates in Iraq is categorically different from normal development aid, which always operates through the recipient government. The precedents for educational intervention through an occupying army include the British, French, Belgian and Japanese colonial regimes, Nazi

Germany, and the Chinese occupation of Tibet. If intervention in Iraq is a new international precedent, does it legitimise initiatives by non-Americans to do the same in the USA.?

9.4 Conclusion – Global Context and Emergent Precepts

The outcome of 'universal' education has been school-focussed ideologies that are national and sometimes nationalistic, but are far from 'universal' or equitable in a global context. The assumption that 'universal' provision should reflect national interests was rarely questioned but is very questionable, not least because of its role in fuelling war and international exploitation. Cross-border regional interests provide equally valid conceptual bases for planning 'universal' provision that is functionally equitable (Zajda, 2005). Private and faith-based provision is often demonstrably inequitable on a national level, yet can appear 'universal' on a global scale and can introduce new ideas and practice – good and bad – across borders. Internationally, selective efforts to improve education in favoured less-developed countries can construct further regional inequities, which create 'service refugees', but this problem could be mitigated through regional aid-related provision which creates 'buffer zones' as in Southern China (Zajda et al., 2006). 'Universal' education provision is not intrinsic to the concept and functioning of the nation state in the way that a justice system, police and defence forces are. Most education systems have been in existence for less time than Coca-Cola, and the universal ideal may not be as permanent, or universal, as it appears.

Education is uniquely a 'compulsory right', which removes one of the main customary right and democratic check on service provision – voting with your feet. That might be unavoidable, but we need to know the degree to which children attend school *willingly* as a comparative indicator of educational effectiveness. Increasing mobility across borders raises the question of whether states have a duty to pay for the education of their tax-paying citizens in other countries. The traditional concept of non-discrimination within education was also nation-based, but invisibly this is being challenged by international and cross-border families, and unaccompanied child migrants. The formal international recognition of qualifications is improving, but international students are uniquely vulnerable, and this proposes the need for an international code of ethics to deter abuse. The only international check on education is provided though 'parents', but this ethic can rationalise separatist or selfish provision, the interest is mono-generational, and it disadvantages children (and elders) with no parents. While international codes create the right for children to be stakeholders in decisions that affect them, this has not been reflected fully in national education law. The notion of the 'universal family' provides a better locus for conceptualising educational equity, because it embodies the rights of children, the usual standards of peer equity, but is also intrinsically intergenerational, and has cross-border, international and supra-national identities. It creates a vision of spatial and temporal 'rolling equity'.

More broadly, the international concept of global/human security, and the notion of 'global (planetary) interests', proposes that nations should not engage in conduct that jeopardises the security of people in other nations, and that certain concerns must now be regulated at supra-national level. But the prevailing understanding of 'universal' education reflects competitive and sometimes aggressive national interests. The teaching of history is a particularly significant aspect, and broader questions about the right of access to reliable global information are related.

The US-led invasion of Iraq raises questions about the degree to which one nation can impose its educational ideology and values on other nations. Piggy-backing education intervention on the back of military intervention has a long but questionable history, and the international community firmly challenged the practice in the last century. The agency concerned, *Creative Associates International*, is unable to explain the legitimacy of its intervention. The UN Charter *might* be interpreted to sanction pre-emptive action against military targets, on the grounds of self-defence, but it certainly does not sanction coercive intervention within another nation's education system on any grounds. In fact Article 1(7) of the UN Charter expressly precludes intervention 'in matters which are essentially within the domestic jurisdiction of any state…'

9.4.1 Global Context

The starting point for this chapter was that, in terms of equity, the 18th–20th century 'universal' ideology is far from universal in scope – spatially, temporally, and conceptually. And that the smuggled assumption that education provision was intrinsically nation-based has been divisive and has fuelled conflicts and international and intra-national inequity. What then is the alternative? It seems neither feasible nor desirable to dismantle national education systems. Subsidiarity – the EU term meaning that 'decisions are taken as closely as possible to the citizen' (EU, 2004) – within the nation-state still provides the best basis for *administering* education, because nations are synonymous with the basic legal and economic systems upon which the day-to-day running of institutions is based, for example contract and employment law. Paradoxically, decentralisation can accommodate a globalising context better, because local administrators can make quick local decisions about global issues ('glocal' subsidiarity'), for example about the needs of cross-border students. However, the nation is not now the only or best entity for *providing* and *regulating* all aspects of education, and *service users* are becoming increasingly less nation-based.

The international relations literature traditionally provides broad-brush principles to encourage human/global security, which include: national integrity and good governance, plural systems of power within nations, regional co-operation and integration (e.g. the EU), and international enforceable ethics (e.g. the UN) (Bayliss & Smith, 2001). But this area of literature also virtually ignores the role of education, yet education provision creates a vehicle for the applicability of these

principles, just as it has done for fuelling conflict. While accepting that one nation should not aggressively take over educational administration in another nation, there is no clear likelihood that a plurality of international service providers within a well-governed nation should compromise education. Plural providers can bring potential benefits such as disseminating good policy and practice across borders, and this includes introducing new ideas into countries with constricted national ideologies and knowledge-bases. The EU has demonstrated that cross-border commercial and human investments reduce the inclination to go to war, and can bring other benefits particularly to those living near borders (Williams & Lee, 2003). Administrative regulation may be best at the national level, but there are also specific aspects of education that would benefit from enforceable intentional ethics. The principles of international relations are now starting to inform education policy and planning in a global context. Figure 9.5 presents emergent precepts, which reflect this trend.
(8030)

- **Global context** – education *administration* follows the principles of 'glocal' subsidiarity,[1] but *service provision, service use* and *regulation* are not intrinsically nation-based.[2] (See 3.1)
- **Educational best-value** – the assessment of international tenders by education providers views value in terms that go beyond short-term monetary factors and include social and educational interests associated with education provision (e.g. mitigating social exclusion, intergenerational interests, enhancing citizenship, building democracy, environmental impact).[3] (See 1.4)
- **Regional provision** – education services recognise the needs and rights of cross-border families and communities, and regional concerns and interests,[4] and may also create buffer zones against 'service refugees'. This can apply to international development aid policies. (See 1.2; 1.5)
- **Rolling equity** – education equity is inter-generational, regional and global; it includes future generations of children, lifelong-learning, and the special needs of elders and excluded communities.[5] (See 2.5)

Fig. 9.5 Emergent precepts for education equity, policy and planning within a global context

[1] 'Glocal' the combination of a local and global view – 'Think globally, act locally'. EU – 'subsidiarity' – http://europa.eu.int/scadplus/leg/en/cig/g4000s.htm

[2] e.g. WTO General Agreement on Trades and Services (GATS). See Joint Declaration on Higher Education and the General Agreement on Trade in Services

http://www.aucc.ca/_pdf/english/statements/2001/gats_10_25_e.pdf

[3] See – Best value – Scottish office – http://www.scotland.gov.uk/about/FCSD/LG-PERF4/00014838/Home.aspx

[4] See Council of Europe Euroregions – http://www.coe.int/T/E/Legal_Affairs/Local_and_regional_Democracy/Transfrontier_co-operation/Euroregions/

[5] See – UNESCO Access and Equity… – www.ched.gov.ph/~icahe/PPT/ UNESCO%20 Perspectives%20-%20Molly%20Lee.ppt

- **Willing attendance** – in order to address the problems that arise because school education is a 'compulsory right', evaluations of provision assess the degree to which children *willingly* attend school, and this can be compared within and between nations. (See 2.1)
- **International right to education** – the probable duty of a state, in which a family are citizens and have paid taxes, to contribute to similar free compulsory education for the children of that family in another country.[6] (See 2.2)
- **Ethics of international study** –provision for *international*,[7] *cross-border*[8] and *transnational students*,[9] of all ages and status, maintains national and international standards of best-practice and specifically precludes discrimination, disadvantage and exploitation.[10] (See 2.4)
- **The universal family** – provides the conceptual locus of education. It embodies the normal principles of peer equity (e.g. gender, race, disability), and identities that are intrinsically intergenerational, and potentially cross-border and international. [[11]] (See 2.5; 1.2; 2.4)
- **Human/global security** – education enhances, and does not harm, the security interests of other countries and of the global population. Specific 'vital' global (planetary) interests take precedence over national interests.[12] (See 2.6; 3.1)
- **'Disarm History'** (UNESCO)[13] – history texts are evidence-based and created through regional cooperation. History does not deceive, it places the reasons for historical conflict in the past, and includes knowledge about positive peace-oriented relationships throughout regional and world history. (See 2.6)
- **Reliable global information** – students have free access to all sources of evidence-based reliable information, current and past.[14] (See 2.6)
- **Education intervention** – the imposition of education systems, policy and/or practice by one national government or its agent(s) in another nation is not legitimate and is precluded by international law.[15] (See 2.6; 3.).

Fig. 9.5 (continued)

[6] The European Human Rights Convention: 'States Parties…shall..make primary education compulsory and available free to all.' (Art.28.1a). Precedents for this principle include, diplomatic and military families, and quasi government organisations such as the British Council.

[7] Living and studying in a country other than their home country.

[8] Living in their home country but receiving education in another country.

[9] Living 'in a country different from the one where the [qualification] awarding institution is based.'

[10] E.g. Code of good practice for the provision of Transnational Education – http://www.aic.lv/meeting/conv_com/eng/C_Item_6.htm

[11] The UN Human Rights Declaration (Art.16.3) states: 'The family is the natural and fundamental group unit of society and is entitled to protection by society and state.' States are required not to 'interfere' with family life within the UN International Covenant on Civil and Political Rights (Art. 17.1), to give 'the widest possible protection and assistance' to families in the International Covenant on Economic, Social and Cultural Rights (Art.10), and in Europe Human Rights Convention (Art. 8) to 'respect family life.'

[12] See Graham (1999).

[13] See: UNESCO (2001).

[14] See: Williams (2001)

[15] Article 1(7) of the UN Charter precludes intervention 'in matters which are essentially within the domestic jurisdiction of any state…'

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Chapter 10
Teacher Candidates' Racial Identity Formation and the Possibilities of Antiracism in Teacher Education

Goli Rezai-Rashti[1] and Patrick Solomon[2]

10.1 Introduction

Local and international perspectives on teacher education for equity and diversity have highlighted the shortcomings of institutions in Western Europe, North America and Australia. Verma's (1993) collection of research in those regions exposes the massive exclusivities and inequalities that are evident in such areas as the selection of student teachers, curriculum and pedagogical processes, and student teachers' practicum experiences within schools and communities. In Canada, more specifically, teacher education institutions continue to recruit predominantly white candidates (Steven Lewis Report, 1992; Solomon and Levine-Rasky, 1994) and offer Eurocentric curricula (Rezai-Rashti, 2004). Zeichner's (1996, pp. 134–35) damning critique of such curricula reads, "culturally encapsulated teachers … continue to be prepared by programs in our colleges and universities for mythical culturally homogeneous school settings."

Confronting the dilemmas of race, racism and antiracism in teacher education scholarship and practice is even more daunting (Cochran-Smith, 1995). Discomfort with the interrogation of race has made "colourblindness" accepted pedagogy in most programs (Solomon, 1995, 2000; Schofield, 1997). This chapter is based on a larger study that examines the study of race, racism and antiracism[1] pedagogy in mainstream pre-service teacher education scholarship, and finds out how such a program prepares graduating teachers to implement antiracism education into their everyday classroom practice. More specifically, this chapter examines how teacher candidates perceive and locate themselves as racialized beings, and discusses possibilities and limitations of a teacher education program in preparing student teachers in teaching for equity and social justice. This chapter is intended to examine the extent to which a teacher education program can integrate issues of race, teacher candidates' racial identity development and its potential impact on learning to teach for equity, diversity, and social justice.

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[1] Throughout this chapter the term "antiracism" and antiracist education/pedagogy will be used interchangeably.

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10.2 Conceptual Framework

In the last 2 decades, an increasing academic interest in theorizing race, racism and antiracism has become quite noticeable in the research literature (Li, 1990; Solomon, 1992, 1996; Sleeter, 1992a, b; Hall, 1996; Dei, 1996a; Britzman, 1998; McCarthy; 1998; Rezai-Rashti, 2004). The contributions arising from various theories and perspectives highlight the theoretical and methodological complexities pertaining to the concept of race and the understanding of racism. Current debates about the notion and meaning of race have enhanced our comprehension of racial inequalities and the operationalization of racial logic in education. Omi and Winant (1986, 1993), in rejecting liberal and radical views on race, have argued that race is neither an ideological construct nor is it an objective condition. They draw attention to the inadequacy of those liberal and radical approaches in the understanding of the concept of race:

> Contemporary racial theory … is often "objectivistic" about its fundamental category. Although abstractly acknowledged to be a socio-historical construct, race in practice is often treated as an objective fact: one simply is one's race; in the contemporary U.S., if we discard euphemisms, we have five color based racial categories: black, white, brown, yellow and red. This is problematic, indeed ridiculous, in numerous ways. Nobody really belongs to these boxes; they are patently absurd reductions of human variation (Omi and Winant, 1993, p. 6).

Omi and Winant (1993, p. 7) offer a critical and process-oriented theory of race which, they argue must meet three requirements: (a) "it must apply to current political relationships," (b) "it must apply to the increasingly global context," and (c) "it must apply across historical times." Accordingly, the concept of race must be understood in a social and historical context. It is not an unchanging, biological concept but rather a complex, dynamic and changing construct. Also contributing to our understanding of racial inequality in schooling is the debate over whether multicultural education or antiracist education best reveals the system of power relations and racial minorities' differential experiences in contemporary educational settings. This discussion has made us more aware of the institutional and social context within which a racial logic works and is practised. It has become clear that the multicultural perspective, with its focus on individual and attitudinal changes, was not able to respond effectively to issues of racial inequality in schooling. Sleeter's (1993) study of how white teachers construct race rejects the psychological view of racism, constructed on attitudinal changes; on the contrary, she calls for fundamental changes at the institutional level, including reversing those policies which produce and reproduce racial inequities.

10.3 Critical Race Theory

Another important contribution, especially in the field of psychology, comes from the theories of racial identity development (Cross, 1971; Helms, 1990, 1995; Thompson & Carter, 1997). These theories reject the fixed biological definition of race, and claim that race is socially and psychologically constructed (Howard, 1999). The Helms' racial identity models are often used in the fields of counselling psychology and education, and are widely referenced

in the academic literature. According to Helms, the development of White People and People of Colour occurs as individuals interpret and respond to the racialized discourses in their environment. A schema or manner of behaving is dominant when it is used primarily in most situations. Helms (1995) explains, "Each time a person is exposed to or believes he or she is exposed to a racial event, the ego selects the dominant racial identity status to assist the person in interpreting the event" (p. 187). Responses to such situations provide the person with a sense of well being and self-esteem.

10.4 An Adaptation of J. Helms' (1995) Racial and Ethnic Identity Development Model

According to the Helms' model, statuses develop or mature sequentially. The white racial identity ego statuses range from the "Contact Status" where the individual is oblivious to racism and is satisfied with the racial status quo, to the "Autonomy Status" where s/he has developed a positive socio-racial group commitment and has the capacity to abandon white entitlement and the privileges of racism. The People of Colour racial identity ego statuses range from "Conformity (Pre-Encounter) Status" where the individual shows allegiances to white standards of merit at the expense of own-group abandonment, to "Integrative Awareness Status" where they value their collective identities. Movements along these statuses occur when their dominant schema can no longer sustain a comfort level or follow them to psychologically survive a racial situation.

The importance of racial identity development theories is the salience they give to race in inter-group interaction and relationships, and the continuous self-reflection and self-examination that allow individuals to move from an inchoate status to the more advanced status. Thomson and Carter (1997, p. 17) state:

> Racial identity development entails a continual and deliberate practice of self examination and experiencing. … In developing racial identity, peoples must undertake careful reflection on the extent to which racial indoctrination has influenced and continues to influence their lives and the manner in which they relate to others who are racially similar or racially dissimilar to themselves. These experiences are ongoing and lifelong.

But the research literature on racial identity and its application to the schooling process raised many issues of student resistance. Tatum's (1992) study: *Talking about race, learning about racism: The application of racial identity development theory in the classroom*, identified three major reasons why college students resist the exploration of race and racism in their curriculum:

(i) The topic of race is taboo for discussion, especially in racially mixed settings
(ii) The myth of meritocracy; students have been socialized into believing that American society was just
(iii) The denial of personal prejudice and distancing of self from any form of racism (this behaviour was most prevalent among White students) (p. 5)

The emotional responses to race-related content in the curriculum were guilt, shame, anger and despair. Solomon's (1995) research found similar emotional

responses from Canadian teacher candidates when the study of race, racism and antiracism was integrated into their teacher education scholarship.

The significance of racial identity development for teacher education lies in the exposure of teachers' "dysconsciousness" or uncritical beliefs, attitudes and perceptions of the existing social order. It allows teachers to grow and believe in possibilities of change. King's (1991) analysis of teachers' impaired consciousness or distorted ways of thinking about race has far reaching implications for teacher preparation in a racially diverse school environment. She advocates a liberatory pedagogy in teacher education scholarship that helps candidates develop the critical skills required for teaching equitably across the "racial divide".

The theories of racial identity development, despite their many benefits, have some noticeable limitations. According to Howard (1999), Helms' white racial identity development model may be used as a guide and as an educative tool, but it might not reflect the experience of everyone. In her study, Robertson-Baghel (1998) raised a number of issues, and argued that current models of racial identity development are inadequate in framing the wide variance in identity statuses and information processing strategies of student teachers. In addition, there is a tendency to essentialize race and minority groups. Communities are often seen as homogeneous entities. Furthermore, such an approach to racial identity does not allow for an analysis of a more complex racial identity development in which the intersection of race with other issues such as ethnicity, gender, social class and issues of sexuality can be explored. In this regard, McCarthy and Crichlow (1993) advance a relational and interdisciplinary approach to the discussion of racial identity and unequal relations in schools. They contend:

> A relational and nonessential approach to the discussion of racial identities allows for a more complex understanding of the educational and political behaviour of minority groups. … There is a need to move beyond static definitions of whites and blacks as they currently pervade existing research in education (xix).

The literature on race and racial identity development posits a number of important questions that need to be explored in this chapter:

- How may teacher educators use antiracism pedagogy to effectively overcome candidates' resistance to exploring racial difference issues in their scholarship?
- How may notions of racelessness and colourblindness affect the way candidates learn to teach in a racially diverse school environment?
- How may teacher educators collaborate in the implementation of a more integrated racial identity formation theory and field-based program that prepares teachers for a racially diverse school environment?

10.5 Study Design and Implementation

The study was designed for teacher candidates to explore their racial identity development and the ways their development status may potentially affect their learning to teach in a racially diverse school environment. The design has three components:

(a) Baselining candidates' racial identity development status: their awareness, attitudes, beliefs, and knowledge about racial diversity and difference; perspectives on anti-racism education and their initial level of competency in teaching from an antiracism perspective. Instruments utilized in the baselining include: (i) Helms' Racial Identity Development (RID) chart (see Table 10.1) for participants to identity with pre-selected items that best reflect their status, (ii) a Multicultural/Antiracism Education Survey consisting of 55 statements, utilizing a 5-point Likert response scale to ascertain respondents' perspectives on various aspects of multicultural and antiracism education policy and practice, and (iii) an Interview Guide that ascertained participants' awareness of their racial identity, racial difference, the extent of racism in Canadian society, and the potential impact of teachers' racial identity on their work in racially diverse schools.

Table 10.1 Racial identity ego statuses and information-processing strategies (IPS)

	People of colour	Whites
1	Conformity (pre-encounter): External self-definition that devalues own group	Contact status: Satisfaction with racial status quo; obliviousness of racism
	IPS: Selective perception and obliviousness of socioracial concerns	IPS: Obliviousness
2	Dissonance (encounter): Ambivalence and confusion concerning own socialracial group commitment	Disintegration: Disorientation and anxiety provoked by unresolvable racial moral dilemmas
	IPS: Repression of anxiety-provoking racial information	IPS: Suppression and ambivalence
3	Immersion: Idealization of one's group and denigration of white	Reintegration: Idealization of one's own socioracial group
	IPS: Hypervigilance toward racial stimuli	IPS: Reshaping reality and selective perception
4	Internalization: Positive commitment to one's own socioracial group.	Pseudoindependence: Intellectualized commitments to one's own socioracial group and deceptive tolerance of other groups
	IPS: Flexibility and analytic thinking	IPS: Reshaping reality and selective perception
5	Integrative awareness status: Capacity to value one's own collective identities; empathize and collaborate with other oppressed groups	Immersion: Search for understanding of the personal meaning of racism and the way one benefits
	IPS: Flexibility and complexity	IPS: Hypervigilance & reshaping
6		Autonomy: Informed positive socioracial group commitment
		IPS: Flexibility and complexity

Based on their level of awareness, participants were asked about their personal and professional needs and growth plan. Interviews were audiotaped for transcription and analysis. From these data participants charted and baselined their levels of awareness and knowledge of diversity with specific focus on race.

(b) Developing individual growth plans that moved them from their initial status to a higher level of conscientiousness and competency for teaching from an antiracism perspective. Such a growth plan should be achievable by the end of their teacher education year and should have applicability in practicum schools and the communities they serve.
(c) Post program evaluation: this evaluation ascertained the extent to which teacher candidates realized their growth plan objectives and the personal and institutional factors that facilitated or hindered growth. Anecdotal reports, journal entries, surveys, focus groups and individual interviews were used to collect these data. Interviews were audio-taped for transcription and analysis.

10.6 Study Setting and Participants

To implement this racial identity study design, teacher candidates were chosen from a 1-year, post-baccalaureate program at a metropolitan university in urban Canada. Specific objectives of this primary/junior teacher education program are to integrate issues of equity, diversity and social justice into foundational courses as well as the classroom curriculum of co-operating (practicum) schools. Over 60% of the pre-service year is spent in urban schools chosen to reflect the race-ethnocultural diversity of the urban population.

A group of 36 volunteers were selected from a larger cohort of 82 pre-service teachers to ensure equitable representation of the following social groups and practicum schools:

- Racial distribution: A fairly even number of Asians, Blacks and Whites were chosen to reflect the proportion in the larger pre-service cohort. Of the 36 volunteers, 18 were self-identified as people of colour and fell into two distinct sub-groups: people of African and Asian heritages. Of the self-identified whites, most were of British, Jewish and Canadian[1] heritage. While most participants are Canadian born, a number of them from both groups are immigrants, schooled to varying degrees in their country of origin before migrating to Canada. As well, there is a wide range of religious affiliation in both groups: Christianity (Catholics and Protestants), Hinduism, Islam and Judaism.
- Gender representation: The proportion of males and females in the sample reflected those in the larger cohort.
- Practicum school racial diversity: Only practicum schools with a high degree of racial/ethnic diversity in their student populations were selected for the project.

10.7 Analysis of Data

Both quantitative and qualitative approaches were used to analyze the range of data collected. In the quantification of data from survey questionnaires, frequency charts provided some general patterns in the data. Pre- and post-program frequency charts from survey data were analyzed and compared to determine the extent to which program intervention and other factors may have changed candidates' perspectives on race, identity and the schooling process. The interviews and other qualitative data provided a deeper and more complex exploration of participants' racial identities and the ways these may impact their learning to teach. Data collection and analysis followed a process that Glaser and Strauss (1967), Erickson (1986) and LeCompte and Preissle (1993) describe as the constant comparison method. Analysis was an ongoing process with research team members independently reviewing transcripts in an iterative manner.

10.8 Findings

10.8.1 The Complexity of Identity (or, Beyond Racial Identity)

It is important to note that although the teacher candidates were positioned in broad racial, ethnic and cultural categories, the respondents are a complex group of individuals, with unique racial identities, who possessed a range of beliefs about social differences, and whose experiences as racialized persons in Canadian society greatly varied[2]. Indeed, when candidates were asked to self-select their racial identity, it was clear that the interplay of racial, ethnic, cultural and national identities complicates the ability of candidates to define themselves as either White or Person of Colour. The process of racialization in the Canadian context constructs whiteness as the invisible norm against which difference is determined. For example, some of the self-identified white candidates, who were identified as non-hyphenated Canadians, and claimed 5th and 6th generation status, tended to see themselves as "raceless." One asserts:

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[2] In this study teacher candidates are those who are engaged in initial teacher education. They are also referred to as "student teachers" or pre-service teachers."
Host teachers (HTs) refer to the teachers in whose classroom teacher candidates are placed for field-based practica. They are also referred to as "associate teachers," "cooperating teacher," or "mentor teachers." In some teacher education models associate teachers are seen as "master teachers" to whom candidates are apprenticed.
The Adjunct Professor (AP) is the liaison between practicum schools and the teacher education facility and has the responsibility of evaluating candidates.
The Practicum Supervisor is university based and is ultimately responsible for the practicum component of teacher education.

> I don't think of white as a race. I would have to think of it as a cultural identity. I just don't think that white means anything; it has no context to me; it is like saying you are Canadian. It doesn't mean anything to me.

Unlike the previous respondents, who did not identify racially, culturally or religiously with any particular social groups, some of the candidates who self-identified as Jewish, explained why it was that they self-identified culturally and religiously with their Jewish heritage more so than identifying as white Canadians. The following excerpts reflect this sentiment:

> I see myself as a Jewish more than a white Canadian because it is what I practice.

One Egyptian-Canadian candidate states:

> I was shocked the first time I participated in the research because I didn't know what group I belonged to. I am not coloured, but if I tell you that I am African-Canadian the only way that you will know that I am different is from my accent. I didn't know where I belonged. I had a problem…I don't think of myself as white, to be honest. I never think of people as white or dark coloured skin; this time is the first time I'm thinking as white. If someone said to me, 'Describe yourself;' I'd say I'm a Jewish woman.

Although some white candidates identified with whiteness, they seemed reluctant to acknowledge the advantages and privileges afforded by dominant white groups in Canadian society. For example, in the following passage, a candidate made a distinction between the category of white, and his perceptions of meanings ascribed to whiteness:

> I don't think it's [advantage] a white thing; I think it's what comes with being white. Educationally, I think I got more attention than the black kids do; I think teachers went out of their way to help me and I don't think that some of my friends [of colour] got that so I think because of that educationally I am sort of better off intellectually than the average person. All my teachers were white, all the kids in the gifted program were white.

Many of the white candidates, who identified strongly with "racelessness," reported that they spent their formative years in homogeneous, white neighbourhoods and did not have personal experience with racial differences. These participants explained that their own racist attitudes, stereotypes, and intolerance for social groups such as Natives and Blacks, were learned through association with relatives and peers. Moreover, their responses suggest that some of these respondents selectively chose from lived experiences to reinforce stereotypes:

> While driving taxi you see the drug dealers who were Black and you see the underbelly of society and a lot of it is black and it's really hard. Like sometimes I have to catch myself because especially with the robberies, it 'pissed' me off and expanded it to the whole black community.

The narratives of the participants suggest that some of the White Candidates are located at the lower end of Helms' (1995) White Racial Identity Ego Status and Information-processing Strategies. Interviews with white candidates reveal their lack of awareness of white privilege, fear of Blacks based on selective experiences, and little more than curiosity about the racial "other". Paradoxically, these same candidates placed themselves at a high racial identity ego status. Almost half of the white respondents rated themselves at the highest status: Autonomy. At this stage candidates are

expected to internalize a newly defined sense of oneself as white, confront racism, and engage in an ongoing process, continually open to new information and new ways of thinking (Helms, 1995). At this early stage of their teacher education, and with little or no prior exposure to antiracist education, candidates were not ready to make an informed commitment to challenge racism in their environments. As will be shown later, their growth plans revealed that they were in fact at the initial stage of acquiring ethno-specific knowledge and awareness of the ethno-cultural diversity around them. Why then do candidates engage in the practice of "status inflation" in this exercise? Commentators speculate that respondents do not want to be perceived as ignorant, intolerant, or even racist in a mixed-race setting, so they locate themselves at "favourable" positions on the scale.

The participants' narratives reveal that their awareness of racial difference and development of a racial identity occurred at different stages in life, but in each case, they explained that their awareness was often developed in response to their observations of differential treatment based on social differences.

A common finding amongst the black candidates was the tendency to limit cross-race interactions to the workplace, and to have close friendships with people from their own racial group. Likewise, a teacher candidate, who identified as Jewish, noted that his earliest memory of racial difference was, at once, an awareness of religious and/or cultural difference. In this regard, candidates identify themselves as having "multiple identities," and that certain aspects of their multi-faceted identity are more important than others. One black candidate comments, *"Your cultural identity is what's important, it's not your racial identity."* As an example, this candidate explains that she is *"more Jamaican than Black."* These findings underscore some of the complexities of racial identities and identifications: racial identity development is shifting and participants occupied various positions on the continuum (see Table 10.1). Moreover, many of the candidates do not perceive that their own awareness of racial development proceeds in a linear way rather than by some specific associations with various elements within a range of the prescribed categories.

> *I am always growing and changing so it moves around a lot, I am always learning.*
>
> *The chart was fairly general and I fit in a number of places…[The categories are] somewhat helpful and it puts things in perspective but more discussion would have been beneficial.*
>
> *[The chart] seemed kind of American because the stages for People of Colour described them as 'black', and not of different races, for example, 'Asian'.*

Although Helms' model is helpful as a guide, the stages tended to homogenize racial groups and as such did not adequately reflect the diversity both within and between racial groupings. For example, although many of the participants' comments suggest that the Racial Identity Development Model was instrumental in helping them to think critically about their own racial identity, not surprisingly, many students had difficulty identifying with the prescribed stages of development outlined in Helms' model. As an example, after the program intervention, candidates were asked to comment on where they had placed themselves according to the categories proposed in Helms' model, and where in retrospect, they would have placed themselves. Some of the participants' responses are as follows:

When I filled this out at the beginning I was really confused just because I didn't know where I fell. I don't call myself White and I don't call myself a person of Colour. But I mean I did check off things, don't know how to identify myself that way. I usually identify myself through my experiences ... I think these stages are good in terms of growing like being able to be your own person and not accepting the stereotypes and things like that. [white candidate]

Nobody can fit exactly into any one level so picking [status] five was basically the best of what was there, but not necessarily who I am. I do acknowledge and I do understand the impact of racism in my life. I have been fortunate that the levels of racism I have experienced are very low or minimal compared to others. My parents did spend a great deal of time educating me on what has happened, what could happen and what will happen to somebody who is Black. The realization that Whites will not view you as equal- I have seen that more than once and it's a matter that you just have to fight against it or do what you have to do. [candidate of color]

I really don't feel I fit anywhere on it ... For me, when I think of who I am and what my culture is and who I represent being White is not first and foremost and so I had a lot of trouble with this whole system of placing myself. I felt like I was placing myself on like some scale having to do with only being White. ... I just checked off, what I checked off, just to almost please everybody.

10.9 Post-program Reflections on Theory and Practice

At the end of the 1-year teacher education program, the researchers met with participants. As well as observing their teaching practices in the host schools, researchers conducted personal interviews with each participant. The findings from these interviews and observations made of candidates in practicum teaching blocks follow this introduction. Researchers also asked participants to repeat the Multicultural/Antiracist Education Survey that each had completed at the beginning of the research period. The comparisons of the survey results (pre- and post-program) offer some interesting findings, which are summarized in Tables 10.2 and 10.3.

While at the beginning of the program candidates overwhelmingly agreed that the goals of antiracist education are to change individual behaviours and attitudes that reinforce racism, the post-program results indicate that respondents were more ambivalent in this regard. However, post-program results indicate that fewer students were ambivalent about the term "antiracism." Findings from the interviews elaborated on candidates' definitions of antiracist education. Whereas 6.1% of respondents in the pre-program survey disagreed that talking about racial and ethnic diversity in the classroom is desirable, this percentage dropped to zero in the post-program survey. Post-program results indicate that respondents were more ambivalent about the survey statement: *ARE lowers the quality of education*. About 90% of candidates in the post-program survey expressed competence to teach from an ARE perspective, compared to 64.7% in pre-program.

In addition, post-program results indicate that more students disagree that they are "colourblind" when it comes to working with students of diverse racial groups.

Table 10.2 Post-program responses to goals and practices of antiracism education

Survey item	Valid percent (%)			
	Agree	Disagree	Ambivalent	N
The goal of Antiracist Education (ARE) is to change individual behaviours and attitudes that reinforce racism	82.4	8.8	8.8	34
The goal of Antiracist Education (ARE) is to change institutional policies and practices that perpetuate racism	91.2	2.9	2.9	34
The term "antiracism" should be replaced because it is negative	9.2	63.6	27.2	33
ARE should be integrated into all subjects	93.9	0	6.1	33
I will teach that racial and ethnic diversity in the classroom is desirable	96.9	0	3.1	33

Table 10.3 Post-program beliefs about antiracism education

Survey item	Valid percent (%)			
	Agree	Disagree	Ambivalent	N
ARE lowers the quality of education	3.0	88.2	8.8	34
Student commitment to education varies across racial/ethnic groups	33.3	54.5	12.2	33
I have the competence to teach from an ARE perspective	90.6	0	9.4	32
Multiculturalism and anti-racism alienate the dominant (White) groups in society	6.3	75.0	18.7	32
I am "colour-blind" when it comes to working with students of diverse racial groups	12.5	78.1	9.3	32

10.10 Conceptualizing "Antiracism"

From the post-program interviews that researchers completed, we found that candidates were ready to provide examples of antiracist educational practices, but that they had little critical analysis with regard to the goals of antiracist education, such as addressing inequitable power relations amongst different racial groups.

Many candidates' understandings of antiracist education fell within what might be termed as the "multicultural stream", which is characterized by an emphasis on

"celebrating" diversity and difference as opposed to promoting critical analysis of issues of systemic and institutional racism within schools. A candidate illustrated an example of the multicultural emphasis:

> *Antiracist education is not making assumptions or stereotypes about individuals belonging to certain cultural groups, everyone is an individual; children should be involved in the teaching process and teach each other, as well as using the parents as a resource in the classroom.*

Other candidates who demonstrated an understanding of the multicultural approach to education highlighted interventions that involved bringing "different cultures" into the classroom through curricular materials; saying hello and goodbye in different languages; making 'everyone' feel welcome by ensuring that their cultural group is represented in the classroom; and promoting 'respect' for others. One white candidate, who identified as Jewish, reveals:

> *I think antiracist education just means respect. If you don't have respect you can't teach antiracist education. The way I practice it is, I don't believe in "put-downs" and a lot of it is kids just making comments about other people, just somebody that is different from them. I hate using the word different.*

Much of multicultural education adopts a "psychologically informed" approach to education: racism is a problem of low self-esteem, a point of view demonstrated by this student who insisted that antiracist education is about developing in children a positive self-image,

> *to teach each other how to value themselves and their culture, to see their culture reflected in the teaching materials. … Antiracist education includes multicultural education.*

While antiracist education might include some of the goals of multicultural education, many candidates were unable to relay a sophisticated definition of antiracist education, or even distinguish between the two educational approaches. However, this was not always the case. For example, candidates of colour were often able to provide well thought out examples of both institutional and systemic forms of inequities in education, and strategies for combating these inequities in the school system. One black candidate reveals:

> *The main thing that sticks out for me for antiracist education is that all cultural groups in Canada are not on the same level playing field and it is so evident when you go into inner-city schools and see the resources that they have and what they are exposed to.*

Susan,[4] a self-identified black candidate, who, like the previous respondent, holds a more developed understanding, explains:

[3] This "stigma" comes from the commonly held belief that the high visibility of racialized minority candidates at the Urban Diversity Site was a result of the Faculty's Access Initiative that actively seeks groups that are under-represented in the teaching profession. Candidates of colour are perceived to be "affirmative action students." More realistically, the concentration of candidates of colour at this Centre may well have to do with the fact that it is one of the catchment site for the Metropolitan Toronto area where the population is more racially diverse than its adjacent geographical areas where other teacher education sites are located.

[4] All teacher candidate names in this chapter are pseudonyms.

[Antiracist Education] means getting rid of racism through the curriculum, through the community, through social services within the school or within the community itself. It means looking at all aspects of the education system and critically analyzing everything else that you do including the curriculum because there is racism in the curriculum as well, I think it is promoting the middle class culture. So, just making sure that you are achieving equity for all different groups.

Other candidates suggested that antiracist education is linked to the concept of social change. These participants were concerned with trying to find ways to empower their students and get them to be 'social change agents'. Dave, another black candidate, comments:

[I] would look at the issue of power in terms of the dominant society and how they achieved it and how it's maintained and then examine the idea of surrounding cultures and how direct and indirect practices of the dominant culture might overtly or covertly hold back or suppress their ethnicity, race, gender.

Some mentioned that antiracist education should be connected to other forms of oppression in society, such as those focused around disability issues, gender or sexual orientation. In general, they showed a level of superficiality in their definitions of antiracist education. Most tended to focus on the personal rather than institutional levels of racism. Candidates of colour were more likely to have a better understanding of systemic racism, and how it plays out in both the educational system and their school culture.

10.11 Candidates' Understanding of "Colourblindness"

At the end of their teacher education program, candidates were able to articulate their understanding of "colourblindness" in a more theoretically grounded fashion than was demonstrated in the first round of interviews. The following excerpts illustrate their levels of understanding and their analyses of such a behaviour in classrooms and schools:

Colourblindness means that you are ignoring an important part of a person's identity … when you ignore something as important as a person's colour which has connection to their race and their culture and their identity as a whole. You are ignoring that person and an essential part of her. … I would never want to alienate my students that way. So, colourblindness in my classroom will never play a part because I want to recognize the [racial] difference in my students and celebrate it. I don't see how anybody could be colourblind - it's not possible unless you are blind.

It's impossible, you have to see a child's colour because that's part of the totality of what she or he is … to be colourblind and try to treat everyone equally is not equality, it's wrong.

Candidates show little patience with those who insist that they are "colourblind" in their approach to teaching. One student suggests:

[Colourblindness] is a way of fooling yourself to say you don't see colour, I believe everybody sees colour and with that colour there are assumptions. I think it is a form of not wanting to deal with the issue, just wanting to sweep things under the rug. It is a frustrating

term and also I remember at the equity conference - going to a whole workshop on the construct of colourblindness …

People are saying there is no difference in a classroom. … There are differences in your classroom; you must accommodate those differences. Colourblindness, I think, is a premise that is extremely flawed.

Some candidates still insist on using the term "colourblindness" to describe a liberal approach in education, where all students are treated the same. As the following quote illustrates, her thoughts belie a certain belief in the myth of meritocracy in school culture:

Colourblindness means that you don't see what the person is outside, you only look at the person inside and that's why when you are teaching you have to affirm … as a teacher I know my philosophy is to affirm, to value and to hear every child's voice.

10.12 From Theory to Classroom Practice

In order to evaluate the extent to which candidates were incorporating antiracism planning in their teaching curriculum, researchers conducted field visits to classrooms and followed up with interviews. While many of the candidates were able to articulate an awareness of racism and inequity in their surrounding school culture, we found that relatively few candidates demonstrated a thorough integration of diversity into their teaching plans. Antiracism planning was often limited to the inclusion of different racial groups in books, literature and other visually oriented classroom materials, or perhaps the candidate would have all the children say, "good morning" in their native language to encourage cross-cultural learning. One candidate, who was leading a kindergarten class, brought in snacks from different cultural backgrounds to share with the children. The initiatives of some candidates could be described as efforts towards creating a "multicultural" curriculum: one that celebrates diversity and difference rather than critically engaging systemic barriers to racial equality in school life.

This reality was demonstrated in the venues that candidates sought to express their diversity initiatives, including "cultural pavilion", a lunch program for students to explore different cultures and religious traditions. Many of these initiatives were confined to "special" times of the year, such as Black History Month. Most candidates used their own cultural background as a resource, especially in describing special events, but little effort was made to teach outside of one's own experience. Several candidates brought in parents as a resource to facilitate a broader exchange of cultural role models in the classroom.

Though the researchers found little evidence of antiracism initiatives in classroom teaching, one white male candidate insists that integrating equity into his teaching had become 'normal'. He noted:

As I sort of lived through this last year, it's become more, I guess, second nature and it's not a conscious effort. I find I am writing lesson plans, and when I look at them, I have addressed certain things and I didn't even intend to do it. I guess it changed the way I attack problems.

When asked specifically about these changes, he explains:

> *I am making conscious sort of modifications. I use grouping for the students and they are all mixed ethnically, ability grouping. … We are always mixing them up; every month or so we switched the kids around so that they are always in different groups.*

Though we asked the candidates specifically about initiatives to incorporate racial diversity into their classrooms, there was a tendency to interpret antiracism as "multiple intelligences", learning styles and the needs of "English as a second language" learners. For example, one candidate commented, "*I think I am taking into consideration diversity, not just race but different learning styles."* Candidates most often cite restrictions placed by curriculum requirements and host teachers as the major obstacle to integrating antiracism into their practice teaching. Some are given little freedom to choose classroom materials. A common remark was, *"As a Teacher Candidate I don't have the power to do what I want in the classroom."* The structure of the practice teaching program ensures that candidates are allowed little continuity in planning teaching blocks in advance of their 3-week assignments with a particular classroom. Often the host teacher had already decided what unit the students should be working on and how the unit should be taught. Many candidates were working on units such as "plants" given by the host teachers, "*I try to bring in vegetables that they might use in their homes and ask the children to talk about it to the class*, for example, "medieval times", "fairy tales," etc. The candidates have little control over setting curriculum. Since these host teachers were evaluating them, not unsurprisingly, candidates were reluctant to move outside of the prescribed teaching portfolio. One candidate remarks:

> *I don't really have all that much freedom. … I don't feel like it is my classroom and I feel like I have to do things a certain way because the bottom line is evaluation.*

Other candidates talked about the differences between primary and junior grades in terms of integration of equity issues. They generally felt that it was easier to discuss and integrate issues of equity in junior grades:

> *Even though this is my block plan and my time, it is really not my time, especially with the kindergarten classes since they already have an established routine … also working in a kindergarten class I found that I had to bring everything down to a different level.*

It is important to note that candidates of colour and white candidates found different obstacles to including antiracism initiatives in their lesson planning. It was a common experience for most white candidates to be congratulated on their efforts to include diversity, whereas candidates of colour were greeted with suspicion in their initiatives. Likewise, some candidates were actively discouraged, by school personnel, from integrating antiracism pedagogy into their classrooms. One candidate of colour relates:

> *I wanted to start a Black History course, but I was <u>heavily</u> questioned on what the curriculum was going to be. They were concerned about what I was going to teach. I did say to them that I wouldn't fill slavery into it. The principal did not want me to have an after-four program. She said I could go around to different classes and teach something for Black History Moth. What I ended up doing was reading "Anancy" stories in the library because that's pretty much what was dictated to me.*

10.13 Evaluation

In this section, we discuss the limitations of the major theories and concepts utilized in developing a framework for the study, and suggest ways to transform teacher education programs to make them more relevant to the teaching of antiracism and other diversity and social justice issues.

10.13.1 Racial Identity Awareness

What was most apparent in our initial attempts to have teacher candidates define their racial identity was how ethnic, cultural and national identity complicates their ability to categorize themselves as either white or person of colour. While most candidates were cognizant of their racial identity and its potential impact on their relationship with the "other", a few who preferred to remain "raceless" claimed that "race doesn't matter." This finding supports the theory of racialization in white dominant societies that construct whiteness as the invisible norm against which racial difference is determined.

The complexities of racialization and some candidates' own unwillingness to locate racially made it difficult for some to identify with prescribed stages of development outlined in one of the research instruments (Helms, 1995) used in the study. White candidates generally claimed higher status/stage than their colleagues of colour (but interview findings revealed that their placements were highly inflated). Such misrepresentation led to a very superficial development of growth plans to become more competent at working for racial equity and diversity. Most candidates of colour, on the other hand, were more realistic in their appraisal of self and competencies, and in working across the "racial divide", drew selectively on their experiences in a racist culture to develop personal and professional growth plans that would challenge racism in schools and communities.

10.13.2 Readiness to Work with Diversity

Pre-program findings indicated that candidates possessed limited knowledge, understanding, acceptance and interpersonal skills for working with racially diverse school and community populations. The awareness of their limitations prompted candidates' development of plans to learn about other cultural groups by visits to ethnic communities and involvement with their cultural institutions. However, at the end of the program, very few candidates had realized the "outreach" goals outlined in their growth plans. Instead, most of their exposure to diversity came from their interactions and relationships with colleagues who are racially different, their cross-race dyad partners, racially and ethnically heterogeneous student populations

in practicum schools, and learning materials and experiences provided by course directors and practicum school personnel.

10.13.3 Antiracism Concept and Competence

Although candidates agreed overwhelmingly with the goals of antiracism pedagogy and claimed competence in teaching from this critical perspective, they showed much ambivalence over the concept of "antiracism." Antiracism was often conceptualized in terms of harmonious and celebratory multiculturalism and perceived good multicultural teaching to be happening if racism is not overtly expressed in classrooms and schools. White candidates felt that they were competent to teach from an antiracism perspective whereas candidates of colour were ambivalent about their competence. With regard to colourblindness, white candidates claimed to be more colourblind than candidates of colour when working with diverse racial groups. Most candidates of colour who claimed to be colourblind were recent immigrants to Canada.

10.13.4 Obstacles to Growth

Candidates identified obstacles to growth as personal and institutional.

(a) *Personal*

Candidates' goals for personal growth included gaining a clearer understanding of their own racial identity as well as those of unfamiliar cultural groups. This would be achieved through self-reflection and visits to ethno-cultural communities and events, readings, discussions and reflecting on these experiences. But in the end, they identified part-time work, single parenthood and other family commitments as the major obstacles to achieving these goals.

(b) *Institutional (School Culture)*

The culture of schools as conservative, competitive and hierarchical was an obstacle to the movement of progressive theories and ideas from the teacher education lecture-room to practicum classrooms. The prevalence of racism in school culture and the curriculum restraints imposed by host teachers created restrictions for candidates integrating antiracism into their pedagogy. The tendency for teachers to marginalize these issues in the curriculum is well documented in other research on teachers and their responses to multiculturalism and antiracism in Ontario and other Canadian schools (Dei, 1996b; Solomon & Levine-Rasky, 1996; Carr & Klassen, 1997). Candidates experienced the new Ontario curriculum as restricting their practise of antiracism pedagogy. While the new curriculum appeared more prescriptive in its return to "the basics", some candidates often used this as an excuse for not engaging in equity and diversity work.

10.13.5 Post-program Evidence of Candidates' Growth

Post-program reflections revealed several areas of growth in awareness, knowledge and skills.

Candidates experienced growth in:

(a) Awareness of cultural stereotyping.
(b) Awareness of "whiteness" as privilege in Canadian society. Some candidates developed a clearer understanding of the intersections of race, ethnic, gender, and social class inequalities in the schooling process.
(c) Skills in dealing with racially and ethnically motivated conflict situations in school.
(d) Use of more inclusive language in the classroom. Such a learning was aided by required and supplementary course readings, the ethnic and racial diversity of the cohort group and association with dyad partners who are racial/ethnically different.
(e) Understanding and theoretical grounding of the term "colourblindness". However, some candidates insisted on using the term to describe a liberal approach to race and education and to demonstrate equal treatment for all racial groups.
(f) Awareness of how race mediates life in classrooms and schools. Some candidates of colour felt more prepared to deal with this reality.

10.13.6 Differential Needs and Expectations of Candidates of Colour and Whites

From the initial assessment it became evident that candidates of colour and whites entered the teacher education program with different orientations, understandings and experiences of race, racism and race privilege. Differential experiences during the program led to some polarization along racial lines and even covert resistance of a White sub-group to the antiracism pedagogy. It became very clear that both groups have different program needs, and spaces must be created to meet the group and individual needs of candidates of different racial orientations.

10.14 Theoretical and Conceptual Issues

This research utilized Helms' model of Racial Identity Development (RID) as a means to identify and interrogate teacher candidates in order to establish their stage of racial identity development and ascertain their attitude, knowledge and behaviour toward racialized minorities in Canadian society.

From the beginning stages of this research, several limitations of these models surfaced. First, there were serious difficulties with some candidates who were unable to categorize their race and ethnic backgrounds.

This is just one of the critiques directed at racial identity development models. It is argued that it constructs race as an objective condition. Omi and Winant (1993) discuss why this is problematic and how the geography of race is becoming more complex with the increasing processes of globalization. They assert:

> Many people don't fit anywhere. Into what categories should we place Arab Americans, for example? Brazilians? South Asians? Such a list could be extended almost indefinitely. Objectivism treatment, lacking a critique of the constructed character of racial meanings, also clashes with experiential dimensions of the issue (p. 6).

Another common issue raised by candidates in relation to the racial identity development model was the confusion and difficulty with the prescribed stages of development as outlined in Helms' model. Many candidates commented on the difficulties they had identifying themselves with any one stage; some even argued that they could relate to all of the stages of this instrument.

The stages tended to homogenize racial groups and did not adequately reflect the diversity both within and between racial groupings. There is a tendency in this model towards essentialization of various groups and communities. This is problematic on two grounds:

(a) The groups and communities are treated as stable and homogeneous entities. "Racial groups such as "Asians," "Latinos," or "Blacks" are therefore discussed as though members of these groups possessed some innate and invariant set of characteristics that set them apart from each other and from "Whites" (McCarthy & Crichlow, 1993, xviii).
(b) Racial inequality is perceived only as a result of stable and objective notion of race; the articulation of race with other important issues such as gender, social class and issues of sexuality remains unexamined. As McCarthy and Crichlow (1993) argue, this approach to racial inequality ignores the fact that the experiences of minority women and girls are substantially different from their male counterparts (xix).

We caution future researchers who intend to use Helms' model of racial identity development to be aware of these limitations.

10.15 Conclusion

To conclude, we feel strongly that any serious antiracism work in teacher education should pay attention and look for ways to include "Whites" and racial minorities in the discussion of racial oppression. It was observed and discussed in the interviews with candidates that there was a widespread "white defensiveness" among White

Candidates and increasing polarization among participants based on their racial and ethnic backgrounds. The challenge ahead is to look for sound strategies which may work with both groups for a better understanding of systemic racism and to overcome the unproductive "white defensiveness."

As Roman (1993) suggests:

> If white students and educators are to become empowered critical analysts of their/our own claims to know the privileged world in which their racial interests function, then such privileges and injustices they reap for others would necessarily become the objects of analyses of structural racism. This would allow white students and educators, for example, to move from *white defensiveness* and *appropriative speech* to stances in which we/they take effective responsibility and action for "disinvesting" in racial privilege (p. 84).

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Chapter 11
Education for Equitable Outcomes or Educational Inequality: A Critical Analysis of UNESCO'S *Education for All* and the United States' *No Child Left Behind* Programs

Karen Biraimah

11.1 Introduction

While the overall goals of UNESCO's *Education for All* (EFA) and the United States' *No Child Left Behind* (NCLB) programs are admirable, approaches for achieving these goals often parallel inappropriate neoliberal, neocolonial, elitist and market driven models (Zajda, 2005, 2006). This chapter discusses key problems that challenge each program in varying degrees, including (a) stratified colonial systems of formal education that perpetuate social inequality through selection and credentialing; (b) the overuse and abuse of measurement, assessment and accountability models; (c) the misuse and abuse of "best practices; and (d) the inappropriate and counter-productive uses of economic models and financial funding to control educational agendas. The chapter concludes by questioning whether there is a "hidden curriculum" within both programs' constructive rhetoric that reflects an agenda far removed from the altruistic goals of EFA and NCLB. It will also question the continued efficacy of using Western-based, White, and elitist educational models to provide real positive educational change and equitable life chances for all the world's children.

11.2 A Comparative Analysis of EFA and NCLB: Models of Neocolonialism and Internal Colonialism

EFA's goals are both admirable and optimistic, and have reflected concerns of comparativists and international educators for decades (UNESCO, 2007). These goals, as described in UNESCO's 2003/4 *Summary Report,* include (1) expanding and improving comprehensive early childhood care and education; (2) ensuring that by 2015 all children have access to free and compulsory primary education of good quality; (3) ensuring the learning needs of all young people and adults are

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met through equitable access to appropriate learning and life skills programmes; (4) achieving a 50% improvement in levels of adult literacy by 2015; (5) eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015; and (6) ensuring that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills (UNESCO, 2002, p. 12.). Clearly, the issue here is not with the goals themselves, but rather the means for achieving such goals. Similarly, the United States' NCLB is a program designed to achieve lofty goals which are nearly as irrefutable as those of EFA.

NCLB's program is built upon four "common-sense pillars" which include (1) stronger accountability for results through statewide accountability systems based on challenging annual testing for all students; (2) more freedom for states and communities through more flexible use of their federal education funds; (3) required use of proven education methods supported by scientifically based research; and (4) more choices for parents by allowing students attending failing schools to attend better public school, with transportation expenses paid by the failing school (U.S. Department of Education, 2004b).

Unfortunately, programs designed to improve access to quality education often suffer from stratified neocolonial or internal colonialism models. These programs sort children by the types of education they receive, and perpetuate social inequality by infusing educational processes that focus on elitism, selection, credentialing, and formal models of education. When Altbach and Kelly (1978) referred to neocolonialism they focused on;

> deliberate policies of the industrialized nations to maintain their domination. It may function through foreign-aid programs, technical advisers, publishing firms, or other means. Dependency and neocolonialism are linked…[with]…the policies of the industrialized nations work[ing] to maintain their position of domination. (Altbach & Kelly, 1978, pp. 30–36)

Using this definition, EFA might be classified as neocolonial because it reflects a model whereby states are controlled by external powers, even when there is the formal appearance of constitutional independence. An example of neocolonialism being played out in the educational context could be EFA's reinforcement of Western pedagogical models within periphery nations. In discussions to follow, this chapter will question the efficacy of EFA offering a one-size fits-all pedagogical approach designed to work with equal effectiveness regardless of context, and whether this reflects a neocolonial perspective.

In contrast to neocolonial theory, Altbach and Kelly (1978) describe models of internal colonialism as:

> the domination of a 'nation' (defined geographically, linguistically, or culturally) within the national borders of another nation-state by another group or groups. ….The peoples of internal colonies have become termed 'minorities,' 'ethnics,' or 'lower classes' rather than peoples, nations, or cultures…The colonizer, often called the dominant power in the case of internal colonialism, proceeded in many cases to redefine the nature of the colonized group, calling them 'culturally disadvantaged' or an 'underclass.' (Altbach & Kelly, 1978, pp. 20–22)

Given this theoretical framework, one might envision NCLB as a model of internal colonialism. Indeed, after just a few years of NCLB there are growing concerns that reforms are penalizing students in a variety of ethnic groups by what is being termed the "diversity penalty" by some researchers. Phillips (2004, p. 1), for example, has noted that 83% of ethnically and socio-economically homogeneous Californian schools met their educational targets as defined by NCLB, while only 40% of the more diverse inner-city schools achieved their NCLB defined educational targets. While it is beyond the scope of this chapter to argue semantics with regard to vestiges of colonialism embedded within global (EFA) and national (NCLB) schemes to improve education, these comparisons do suggest similar patterns of unequal access to power, control and outcomes. However, when we examine accountability schemes, "best practices," and economic modeling we find EFA and NCLB closely aligned to urban elitist, Western models of education that do not necessarily incorporate the richness and diversity of teaching methodologies, students' ways of knowing and indigenous and/or local cultures.

11.3 Measurement, Assessment and Accountability Models

Accountability-driven models such as EFA and NCLB are designed to improve access to "quality" education and education outputs by measurements derived from standardized, high-stakes testing. This section will review issues surrounding current accountability-driven education programs, including controversies concerning standardized examinations and high-stakes testing. It will also discuss how high-stakes accountability systems may discriminate against the marginalized and reduce the quality of instruction.

Like EFA, educators embracing NCLB are driven by external measurements of success. Scholarship focusing on the impact of NCLB suggests that one of the main goals of the act is to reduce the achievement gap between the socioeconomic classes through the production of more highly qualified teachers, an educational system that promotes high academic standards, and increased institutional accountability (Day-Vines & Patton, 2003; Fusarelli, 2004; and Sunderman, 2003). Clearly NCLB is embedded with the potential to ameliorate issues of educational equity and diversity within U.S. schools. Program guidelines no longer allow schools to hide the low performance of subgroups defined by race, income, or language ability as all test data must now be reported in disaggregated format. For Fusarelli this emphasis on disaggregated test results "may create greater equity within public education by forcing educators to address the achievement gap among ethnic and socioeconomic groups" (p. 76).

Unfortunately, NCLB's outcomes may not necessarily reinforce the goals of equity and diversity within U.S. schools, and its comparison to the *Brown versus Board of Education* decision to desegregate might be inappropriate. Certainly, when issues of equity and diversity in U.S. schools are discussed, images of *Brown versus Board of Education* are evoked. However, a clear distinctions must be drawn

between the intent and perceived outcomes of NCLB and "Brown." For Au (2004) "Too many schools still fail to adequately educate too many low-income children and children of color." (p. 21) However, it would be unwise to link our hopes for more equity to the theoretical promises of accountability embedded within NCLB, for a key difference remains between the *Brown* decision and NCLB, and that difference rests on the definition of "achievement." Achievement under NCLB is narrowly defined by test scores, while *Brown* was focused more on ultimate achievement in life. Moreover, NCLB fails to provide a pedagogical vision of egalitarian social change because its education policies are not anchored to a focused drive toward great social equity and justice:

> There are really only two significant groups that fully support [NCLB]: the political apparatus of the Bush Administration – which feeds its official line on down through state, district, and school policies; and the business community, like Bush's long-time family friends the McGraws (of McGraw-Hill publishing), who salivate at the billions of federal dollars being poured into the high-stakes testing and test-preparation industries. (p. 22)

Based on information provided on its government sponsored websites, NCLB is clearly designed, at least in part, to use education as a tool to gain economic ends. According to Susan Traiman, Director of Education Initiatives at the Business Roundtable:

> Successful public schools are not only in the best interest of students, parents and teachers, but they are also important to a strong economy and viable communities…The business community sees testing as one of the most important tools for improvement. (U.S. Department of Education, 2004d, p. 2)

Moreover, the simplistic position of "if you are not for us, you are against us" may clearly represent the alignment of the Department of Education with the business agenda and its support of high-stakes testing. Recently U.S. Secretary of Education, Rod Paige (2004), said:

> Anyone who opposes annual testing of children is an apologist for a broken system of education that dismisses certain children and classes of children as unteachable…As the use of standardized tests increases…there will be greater pressure on low-performing schools to improve. This worries those who might feel that pressure and so they have attempted to undermine the accountability movement by challenging the usefulness of testing. (U.S. Department of Education, 2004d, p. 3)

According to Au (2004), the Bush administration's attempt to link NCLB to the Brown legacy is a tactical move to protect NCLB from its critics. For how could one argue against a program that requires schools to report test scores by race, language proficiency, and economic background and focuses on the achievement gap? Challenging NCLB would certainly suggest an opposition to civil rights:

> This is the irony of the attempts to link NCLB with the Brown decision.…The NCLB, with its lack of funding and over-reliance on high-stakes testing, will ultimately hurt the low-income students and students of color the ESEA [Elementary and Secondary Education Act] was supposed to help in the first place. (p. 22)

However, recent scholarship (Day-Vines & Patton, 2003; English & Steffy, 2001; Fusarelli, 2004; Goertz & Duffy, 2003) suggests that NCLB's emphasis on testing and accountability will work against students who learn differently, including

culturally and linguistically diverse learners. High-stakes testing limits teachers' flexibility and creativity and drill-and-kill skills sets are often overemphasized, leaving little time to explore the outside world or to develop critical thinking skills. Moreover, NCLB's emphasis on testing and accountability may be harmful to multiculturalism as the legislation ignores the impact of diverse learning styles or the importance of teachers who are "culturally competent" (Day-Vines & Patton, 2003, p. 2).

Granted, many ideas contained in NCLB are not new, including its emphasis on research-based curriculum methods and student performance within ethnic and socioeconomic groups. However, some worry that the negative connotations and punitive sanctions embedded within NCLB will fall more heavily upon lower socioeconomic schools and those with a more diverse student population. Thus, "The unintended effect of hammering school districts with test scores is to flatten the curriculum, reduce diversity, reward minimal performance with commendations, and reduce initiative to engage in reform" (English & Steffy, 2001, p. 13).

In a similar manner, Goldstein (2004), when critiquing EFA posited that the program could be:

> seriously undermined by its reliance upon the achievement of numerical 'targets'…(due to) the distorting effects that 'high stakes' target setting can lead to, by encouraging individuals to adapt their behaviour in order to maximize perceived rewards; viewed as a rational response to external pressures. … (pp. 7–8)

Examples of these numerical targets might include *Education For All's* goal for all children having access to free and compulsory primary education of 'good quality by 2015' (UNESCO, 2003). Thus, like NCLB, educators embracing EFA are being driven by external measurements of success, which sound laudable, but may prove to be counterproductive. Examinations should not be used to exclude, punish or disempower. Rather, they should be used as they were intended, to help us understand the effectiveness of programs and how both programs and their curricula can be improved.

11.4 "Best Practices" and Knowledge Control

With little significant opposition, proven and promising "best practices" have subtly emerged within the educational literature. Indeed, who could object to carefully chosen program entitled *Education for All* or *No Child Left Behind?* And who would object to employing "best practices?" However, "best practices" has often come to mean scientifically-based, quantitatively tested educational practices which mirror selective pedagogy most often associated with White, elitist, market-driven Western-style education. Impediments to the "best practices" educational agenda include qualitatively based educational programs emphasizing diverse learning styles and non-Western ways of knowing.

UNESCO's EFA program is a current example of how Western models of education have been forced on periphery nations under the assumption that their "best practices" are "best" for all student populations. For example, the imposition of

Western learner-centered educational paradigms is often justified in cognitive, apolitical terms of improving effective learning outcomes (Zajda, 2005, 2006). Yet, some suggest that this teaching style leads to democratization and capitalism, and question what the actual learning outcomes will be, and who will benefit the most (Zajda et al., 2006). According to Bray (1993):

> Given its democratic tendencies, learner-centered pedagogy was a natural choice for the development of democratic social relations in the schools of aid-receiving countries. Aid agencies, therefore, had to be explicit about their preference for the pedagogy. [Learner-centered pedagogy] is an ideological outlook, a worldview intended to develop a preferred kind of society and people. It is in this sense that it should be seen as representing a process of Westernisation disguised as quality and effective teaching. (p. 7)

Tabulawa (2003) suggests that there are no current studies that definitively prove that "learner-centeredness is necessarily superior to traditional teaching in developing countries in terms of improving students' achievement in test scores," and that this style of teaching simply "reflects the 'norms' of a liberal Western subculture," and a process of Westernization "disguised as better teaching" (p. 10).

Moreover, this movement to democratize the classrooms through the adoption of a learner-centered pedagogy is expected to impede current authoritarian practices in periphery schools in order to produce individuals whose mind sets are more compatible with political conditions deemed necessary for the penetration of the free-market economic system. This argument not withstanding, it is interesting to note that aid agencies are exporting this pedagogy at a time when the same pedagogy is being downgraded within donor countries. For example, the National Curriculum in the United Kingdom is moving toward a return of more "formalistic and traditional methods of teaching and learning." (Tabulawa, 2003, p. 23).

While EFA is a relative newcomer, periphery nations have endured decades of educational reforms encouraged by Western aid agencies. Take for example the USAID-funded Primary Education Improvement Project (PEIP) which was implemented in Botswana between 1981 and 1991. Using classroom practice similar to constructivist learner-centered pedagogy the goal, according to Tabulawa (2003), was "to improve the quality, relevance and effectiveness of teaching and learning in the primary schools" through the promotion of "democratic social relations through a constructivist and co-operative approach to teaching and learning" (p. 19). Its intent was to change the prevailing authoritarian student-teacher relationship to a more democratic one in which the teacher is a facilitator of the students' learning, not an arbiter of all knowledge.

PEIP, as a USAID-sponsored project, aimed at eroding traditional habits such as the unquestioned acceptance of authority. However, this Western-based educational outcome was not necessarily appreciated by the parents of the students, for they felt their children were being socialized into behaviors that were incongruent within the Botswana culture. For example, parents objected to their children being encouraged to approach adults for help or to show off their work instead of waiting at a respectable distance. Clearly the USAID funded school project served to challenge the hierarchical social relations inherent within the Botswana culture.

Though not a part of the globalization of Western education as demonstrated by USAID and EFA programs, NCLB also established a narrow path to positive educational outcomes, dictated by "best practices" and scientifically-based research. As underscored in government-sponsored websites, "*No Child Left Behind* sets forth rigorous requirements to ensure that research is scientifically based…[and] moves the testing of educational practices toward the medical model", as demonstrated below:

> Under *No Child Left Behind*, federal support is targeted to those educational programs that have been demonstrated to be effective through rigorous scientific research. Furthermore, *No Child Left Behind*'s accountability requirements bring real consequences to those schools that continually fail to improve student achievement as a result of using programs and practices for which there is no evidence of success. (U.S. Department of Education, 2004e, p. 1)

However, it is not simply NCLB's determination to only accept educational research that is scientifically based, to the exclusion of all other types of research that is problematic, but its methods for selecting what research is to become the 'gold standard'. In 2002, NCLB established the What Works Clearinghouse (WWC) through the U.S. Department of Education's Institute of Education Sciences "to provide educators, policymakers, researchers, and the public with a central and trusted source of scientific evidence of what works in education." (U.S. Department of Education, 2004e, p. 1). Certainly knowledge control at its finest! The rationale supporting this attempt at governmental control of knowledge is based on the following logic:

> Currently, few resources exist to help education decision makers differentiate high-quality research from weaker research and promotional claims. As a decision-making tool, the What Works Clearinghouse (WWC) helps the education community locate and recognize credible and reliable evidence to make informed decisions. (U.S. Department of Education, 2004e, p. 1)

Now, instead of consulting our professional peer-reviewed journals and making our own informed judgments regarding appropriate and relevant research, the government will do our thinking for us. The U.S. government will now decide which pieces of research pass their "litmus test" of scientific rigor, thereby establishing a country-wide censored operation that eliminates the need for professional self-regulation or peer-review.

NCLB's power to control the distribution of knowledge is compounded by their control over the grants that drive U.S. research agendas and publications. For example, in July 2004 a request for grant applications was issued by the Institute of Education Science, the entity designated by NCLB to develop the What Works Clearinghouse (WWC). This particular grant may pose serious threats to the education community because it attempts to direct future research agendas. The title of this grant is "Postdoctoral Research Training Fellowship in the Education Sciences" (U.S. Department of Education, 2004a). According to the government announcement, the purpose of the training fellowship in the Education Sciences is to:

> support the training of postdoctoral fellows interested in conducting applied education research, and to produce a cadre of education researchers willing and able to conduct a new generation of methodologically rigorous and educationally relevant scientific research that will provide solutions to pressing problems and challenges facing American education.

While the process for selecting "best practices" has been made to appear unbiased, scientific, and in the educator's best interest, one still wonders who will set the protocols, and for what end? Who defines and selects what is relevant? Moreover, when we are selecting "best practices" through this very scientifically controlled process, what assurance do we have that these "best practices" are actually best for all student populations?

This control of knowledge and future research agendas has not gone unnoticed by academe. Davis (2003) prepared a compelling argument for educators to acknowledge NCLB's challenge to educational research agendas. According to Davis the U.S. Department of Education:

> advocated 'best practices' will be determined now and in the future according to a medical model applied to educational research.…Other research traditions-including case studies, qualitative analyses, historical inquiries, and surveys, for example-lie outside of this narrowed privilege. Furthermore, the plan explicitly seeks 'transformation' of the educational research enterprise-its assumptions, conduct, and preparation of researchers-from what it dismissively labels as 'opinion' or 'ideology' to research inquiries guided by strict adherence to 'scientific' standards. (pp. 103–104)

In reviewing governmental documents, Davis warns us that 'scientifically valid research' "is the operative code-word phrase" (p. 105). In the selection and purging of research reports and documents, Davis comments that "those who make the decisions about acquisitions" have the most important roles (p. 106). For example, who will determine the 'scientific' merit of available research that can be accessed? It is Davis' opinion that the new agencies developed in the wake of NCLB were created to promote ideological conformity among educators:

> …they press for only some types of research and deny even recognition to unapproved studies, they effectively will restrict options for choice by responsible educators and citizens. They can serve to deskill local and state education decision-makers as well as democracy itself. (p. 107)

While the charges and cautions offered by Davis (2003) are critical to understanding the potential threat to future educational research agendas in general, Lather (2004) quoting Canclini questions the policy:

> how might the federal effort to legislate scientific method be read as a backlash against the proliferation of research approaches of the past 20 years out of cultural studies, feminist methodology, radical environmentalists, ethnic studies, and social studies of science, a backlash where in the guise of objectivity and good science, 'colonial, Western, masculine, white and other biases' are smuggled in. (p. 16)

According to Lather the exclusionary approach of NCLP reflects a definite rejection of alternate sources of evidence, methodologies, values and politics:

> …human volition and program variability, cultural diversity, multiple disciplinary perspectives, the import of partnerships with practitioners, even the ethical considerations of random designs: all are swept away in a unified theory of scientific advancement… (p. 19)

Moreover, there is danger when the federal government imposes an evidence-based social engineering approach to educational reform. Clearly, the federal government should not be in the business of mandating a particular method of inquiry, for there

is much to learn from other more qualitative, naturalistic approaches to research. In a field as complex as teaching where replicability is often problematic, it is important for research to reflect upon *how* and *why* particular treatments work.

Though programs such as EFA and NCLB may be designed to produce positive educational outcomes for some children, there is a need to develop positive educational alternatives to their "best practices." This might be done through the inclusion of locally redesigned educational programs, and nonformal and informal systems of education. By moving beyond a fixation on one formal Western education system of best practices educators might include multiple approaches such as nonformal and informal systems of education. Programs could be designed to reach students disadvantaged in a formal "colonial" educational system, and the goals of more equitable quality education for all might best be achieved through the development of a pedagogy focused on a redistribution, rather than stratification of education.

Clearly it is time to develop alternative and culturally responsible pedagogies, as there is no justification for a universal pedagogy when effective education is contextually based. As homogenized pedagogy marginalizes alternative learning theories, there is an immediate need to value and sustain indigenous pedagogies. "But this first requires that we recognize indigenous knowledge systems as legitimate knowledge systems that have potential for enriching students' educational experiences" (Tabulawa, 2003, p. 23).

11.5 Economic Models and Financial Aid to Control Education Agendas

The financial structuring embedded within EFA and NCLB seems to suggest that curriculum may be driving end results which do not necessarily parallel their publicly-articulated goals. In short, one must ask if NCLB is funded to fail while EFA is actually funded to perpetuate dependency.

In the case of EFA education can be viewed as a tool used by Western countries to disseminate ideologies which support their own interests. In this model, educational aid, represented by the transfer of resources, technologies, culture, values and teaching methodologies, is seen a way of favoring particular ways of thinking. As previously mentioned, some view Western models of education transmitted via educational aid programs to non-Western developing countries as a conscious attempt to promote capitalism. Western education, through educational aid plans devised by UNESCO, USAID and others is expected to erode and replace traditional societal discourse with an educated elite with Western values and entrepreneurial attitudes. Supported by human capital theory, with its central tenet that educated individuals are more economically productive than less educated ones, the study of economics of education began to focus on the social and private rate of returns to educational investment. And, as this position on educational programs currently dominates views within Western aid agencies, it also suggests that a liberal form of democracy

is a necessary condition for economic development. Thus aid programs focusing on infusing Western pedagogy within developing countries do so, not for altruistic motives, but rather to reinforce a capitalistic style of economics.

However, some scholars are not content with this rather indirect inculcation of selected economic models via Western-style education, and suggest that free universal education plans such as EFA are condemned to fail because they are not driven by a market economy model. According to Coulson (2003), research from the World Bank, UNESCO and other agencies could contribute substantially to the achievements of EFA if it was used to establish specific policy recommendations for developing nations. Coulson's research concludes that education markets are likely to produce superior academic achievement and greater efficiency than government funded schools, though he concedes that education markets all share a significant challenge; they can not guarantee universal access to the best schools for lower socioeconomic students. Thus, Coulson has suggested a scheme to subsidize access to the education market in proportion to need. Those students coming from the poorest families would have all but a very small portion of educational costs subsidized by the state, while progressively wealthier families would receive little or no aid. Yet for Coulson, the practical implementation problems are not the greatest barriers to access and equity in education for all:

> …bringing the benefits of market education within reach of all children. The real problem is a belief that pervades most international aid agencies and some governments in the developing world: *education should/must/will be provided free-of-charge by the state*.… Despite the empirically demonstrated superiority of fee-charging market schools, leaders in the international development community agreed in Dakar that education should be 'free and compulsory.' (UNESCO, 2000, p. 22)

He believes that communities that automatically assign students to government-funded schools have automatically established roadblocks for the provision of quality education to all its children. Moreover, Coulson believes that "Universal free government schooling is not only ill-suited to the achievement of Education for All, it is unaffordable" (p. 23). He negates EFA's concept of free, government education for all, saying market education will improve education for all.

However, while theorists wrestle with the potentially negative aspects of EFA, which is seen by some as a threat to non-Western cultures, through the inculcation of capitalism, and by others as condemned to fail because it lacks more market-driven incentives, the NCLB program may be using economic schemes purposely designed to fail. While critics of NCLB suggest that its funding levels are woefully inadequate to accomplish its goals, NCLB defenders respond that the program is not underfunded because it was only designed to impose accountability systems of testing and standards, not to undertake actual school reforms. These proponents argue that the true federal responsibility is one of accountability, where by NCLB would hold schools responsible for achieving the new mandates, and not the actually funding of education programs and services needed to reach these goals. Moreover, since developing standards and tests is relatively inexpensive, when compared to real educational program improvement efforts, NCLB, they argue, is

adequately funded. NCLB proponents then repeat the well-used argument that "If money could solve the educational problem, it would by now be behind us. Unfortunately, there is scant evidence that, in the absence of market competition, more money makes for better schools…" (See Peterson, P.E. and West, M.R., *Education Week*, March 17, 2004):

> In contrast to the proponents of NCLB Karp (2004) posits that
> No state has ever reached the proficiency levels that the No Child Left Behind law insists upon and mandating it won't make it so. To expect schools to wipe out long-standing academic achievement gaps while denying them substantial new resources and leaving many of the social factors that contribute to this inequality in place is not an 'accountability' system. It's a politically designed setup.…The goal is to codify a rigid system of test-driven 'accountability' that sets up public schools for failure, justifies steps toward privatization and vouchers, and uses standards and tests to push other, more democratic approaches to school improvement to the sidelines. (p. 8)

This suggests that the designers of NCLB have programmed schools to fail, thus setting up the path for the real agenda which focuses on privatization and vouchers. The fears expressed by critics of NCLB have often become reality in public schools in the U.S. Though no succinct evidence is currently available to underscore conspiracy theories, the end result, the decline of public schools that serve traditional low socioeconomic/minority and urban/rural populations remains a distinct possibility. Take the case of education in Florida's K-12 public schools, for example. Based on NCLB rules, school districts are required to "divert up to 15% of their federal anti-poverty money to transportation so children at schools that are not meeting reading and math standards can move to ones that do" (Orlando Sentinel, July 9, 2004, A1). In Florida, "more than $50 million in classroom money is at risk of being diverted to gasoline and tires" (Orlando Sentinel, July 9, 2004, A1). However, schools in these categories stand to lose even more, as about $5,000 in state funding for each child who transfers will also be lost.

Clearly, if federal funds are reassigned from buses to books, education programs will suffer. Yet it is only pure conjecture at this point whether these "transplanted" students will fair any better at their newly adopted schools. Not only are students often subject to long and exhausting bus rides, but these transfers are not necessarily welcomed at their receiving schools. In certain cases in central Florida, receiving schools have conducted non-binding votes to reject "transplanted" students due to over-crowding and the threat that they may drive down school test score averages. Moreover, the schools these students are transferring to do not necessarily have better track records of raising the test scores of this marginal student population. (Orlando Sentinel, July 9, 2004, B2; August 10, 2004, A1 & A6; July 19, 2004, A1, A11; July 27, 2004, B3)

However, while Florida prepared to reallocate funding to various busing schemes if some of its poorer Title I schools not making 'the grade,' it simultaneously set upon a new plan to develop a "return on investment" price tag for Florida Comprehensive Achievement Test (FCAT) scores (the high-stakes test used by

Florida to comply with NCLB legislation). As a recent news article shows, Florida was going to reward excellence in educational outcomes:

> Florida is about to roll out a new school-grading system that affixes a price tag to FCAT test scores. Called 'Return on Investment,' the project aims to point out which schools are most 'efficient' at improving test scores on the already high-stakes Florida Comprehensive Achievement Test. Adopting a standard tool from the business world, the Return on Investment index would calculate how much a school's FCAT scores increased, divided by how much it spent per student…School administrators across Florida are alarmed.…They say the Return on Investment index is unfair because it makes no adjustment for things schools often cannot control: teacher pay, cost of living, local demographics… [However, Florida continues to move] toward judging schools by a business model for at least two years, part of a national movement advocated by business-minded education foundations (St. John, 2004, pp. 1–3)

In any case, the critics who say that more money will not fix the problem may be correct with regard to the current mandates of the NCLB program. Pouring additional funds into NCLB, as it is currently structured, will only direct more money to the testing companies, supplemental tutorial providers, for-profit educational companies, and voucher-inspired 'choice' programs. Perhaps what really needs to be done is to transform NCLB from a test, punish and privatize program into one focused on real school improvement.

11.6 Conclusion

When analyzing the different conceptions regarding quality teaching, learning, and the value of quality research, what can be concluded? Some educators believe that we have the choice between two reform approaches. We can follow a reform program focused on social equity, and social justice as measured by high-stakes test scores and one set of "best practices" for all (Zajda et al., 2006). Alternatively, we can select a program that values a rich and challenging curriculum based on social equity and involving high expectations, academic rigor and expertly prepared teachers committed to meet the needs of a diverse student population. The choice is indeed ours (Arhar, 2003; and Biraimah, 2005).

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Chapter 12
Gender and the Case of Girls' Education: Organizational Learning in International Development Agencies

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12.1 Introduction

With the increased financial constraints and concomitant public budget reductions in most developing countries, the importance of international development agencies (IDAs hereafter) in those countries has increased dramatically. IDAs represent a very important source of additional funding for education in the Third World. Although these funds are not large in absolute terms, they constitute a substantial resource for engaging in innovative projects and even undertaking educational reforms, thus enabling education systems to address explicitly issues pertaining efficiency, quality, and equity, thus enabling them to go well beyond the simple provision of schooling. For many years, IDAs have rejected studies focusing on their functioning and performance, fearing that such a concern would attract only critics. In addition, their overemphasis on a normative view of development did not promote attention to organizational problems (van Ufford et al., 1988). In recent years, this position has changed; in fact, the study we present here was requested by the Swedish Ministry of Foreign Affairs.

12.2 Gender and Development

The importance of considering women in development took hold with the First World's Women Conference in Mexico in 1975. At that time, the concept of women in development (WID) highlighted the inferior condition of women and called for measures to ensure parity with men. Through the years, this concept was replaced by another that was seen as more comprehensive and more correct in that it considered the subordination of women as the result of interactions and relations between women and men; thus gender and development (GAD) emerged.

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Gender, unlike any other development issue, addresses the basic core of who and what we are as human beings and implicates our most intimate relationships. Since it is unavoidably personal, it generates resistance as it seeks to change relations between men and women (Kabeer, 1994). While in the end society may benefit from the breaking of barriers between conceptions of femininity and masculinity, the perception of imagined and real loss of power deters many governments from giving it serious consideration. On the other hand, an impressive collection of formal agreements in global forums highly influenced by non-governmental (NGO) work – from Rio in 1992 to Rome in 1996 – increasingly commits governments to consider gender in their national plans and development efforts.

Notwithstanding the increased salience of gender within the policy objectives of donor agencies, its treatment remains weak for several reasons: (1) there is a reluctance to ideal with ideological and cultural sources of gender inequality (Moser, 1989; Jaquette, 1997), (2) the main interlocutor of development assistance continues to be the state even though feminist analyses have demonstrated that the state itself is implication in the subordination of women, (3) there is a tendency to keep a distance from women's organizations, particularly feminist groups (Stromquist, 1996; Forss et al., 1998), and there is strong avoidance of dealing with structural obstacles to women's productivity and participation such as: women's lack of property rights, including inheritance of agricultural lands; the prevailing sexual division of labor; women's limited access to credit and technical assistance; and women's control over women's bodies through sexual and physical violence, forced motherhood, and limited physical freedom (Kabeer, 1994; Jahan, 1995). Another feature of IDA's work on gender is that, although the GAD concept is often invoked, its operationalization seldom reformulates the relations between men and women.

12.3 Organizational Learning

There are multiple definitions of organizational learning. In this study we choose to use a definition proposed by Swieringa and Wiersdman (1992), who state that organizations can be said to have learned only when people who work in it behave differently. In other words, while individual learning need not materialize in specific behaviors, when we transfer the concept of learning to organizations, the sensible way to demonstrate new knowledge would be through its application and the creation of "collective elements and patterns in the behavior of people working in an organization" (Swieringa & Wiersdman, 1992, p. 6).

In considering the extent and complexity of knowledge that can be acquired, several writers have proposed three levels of learning, moving from single loop to double loop and triple loop (Swieringa & Wiersdman, 1992; Argyris & Schon, 1978). Single loop refers to learning that permits the improvement of rules and

solutions within existing insights and principles. Double-loop learning is generally concerned with conflicts, disputes, and contradictions within the organization, and thus seeks to engage in renewal. Triple-loop learning, sometimes called deutero learning, is concerned with the questioning of existing organizational principles and the development of new ones with which an organization can proceed to a subsequent phase of existence.

12.4 A Conceptual Framework

In an effort to gather a more complete understanding of organizational learning, Huber (1990) proposes a distinction between four processes that are integrally linked to organizational learning: (1) knowledge acquisition, (2) information distribution, (3) information interpretation, and (4) organizational memory. These are useful distinctions for a closer look at processes that sustain learning in organizations. They focus on practical things that can be done to develop and sustain higher levels of organizational learning. Therefore, this framework was selected for our investigation of IDA learning.

In addition to these concrete elements in the process of organizational learning, it is also important to pay attention to how learning is embedded in three aspects of organizational life: structure, process, and culture. Culture makes learning activities either normal or extraordinary, may foster particular forms of information interpretation and may prevent the creation of an institutional memory. Structure may create divisions among roles that segment knowledge and thus render difficult knowledge acquisition and information distribution. Processes that are rigid, vertical, and time-consuming absorb energies and produce divisions that affect the distribution of information.

12.5 Research Objectives

The purpose of this study is to examine three issues:

(1) the extent and significance of organizational learning in international development agencies (IDAs) concerning gender and education; that is, to what extent do project staff and management in these organizations learn about effectiveness and successful policies and practices?.
(2) the manner in which IDAs learn; i.e., what does it mean to learn and which are the organizational features that appear to facilitate and consolidate learning?
(3) the factors that create obstacles to learning, i.e., those that block the acquisition of new knowledge or that make people and organizations hesitant or reluctant to use the knowledge they may have?

12.6 Mode of Inquiry

This study is part of a larger study that comprised three issues (girls' education, technical assistance, and evaluation). The focus on "girls' education" was determined by the IDA sponsoring the study. This in itself reflects a particular way of framing the problematic situation concerning gender, since it evinces a concern for girls but not for adult women. The topic of girls' education constitutes an example of fairly rapid change since it is characterized by the generation of new knowledge and application in development cooperation. Since the early 1980s, much has been written on women and education and, more specifically, on the performance of girls in school more specifically. Many large educational programs today comprise components that try to promote girls' education and to address social structures that force girls out of the educational system.

Our research can be divided into four steps: (1) tracing the relevant academic literature on organizational change, (2) contacting consultancy firms in the field and obtaining a selection of reports from organizations that have developed learning strategies, (3) analyzing agency reports and projects to trace their conceptions of development and the provision of development assistance materials (policy statements, project descriptions, annual reports, country strategies, etc.), and (4) interviewing personnel in selected IDAs.

A group of two bilateral (the Swedish and the Norwegian agencies – Sida and NORAD), and three multilateral agencies (UNICEF, UNDP, and the World Bank) was contacted over a 6-month period. Interview data were obtained by means of semi-structured interviews with persons covering a variety of roles and responsibilities in the structure of the agencies (ranging from program officers to evaluators and managers); these data were triangulated with those of peers, consultant report findings, and observations in the field, to ensure reliability and validity. Further, field observations of actual projects and interviews with project partners and personnel took place in two countries, India and Bangladesh. While IDAs are complex organizations and depth is lost through multiple comparisons, important similarities also emerge through comparative approaches. Further, the nature of the linkages among IDAs can also be observed.

A major limitation of the study is the short time period during which it had to be conducted. Agency visits lasted about 3 to 4 days. Project visits in India and Bangladesh took a similar amount of time. With respect to learning itself, we are almost totally confined to assessing what people told us and what we could find in the written material as well as in the practices we observed. Tacit knowledge – the things one knows but does not talk about, or that are implicit – could not be grasped during our short visits. A significant conceptual limitation of the study is that, although IDAs are extremely political organizations that operate in the area of relations among countries, the political nature of this activity is downplayed to focus instead on their managerial and organizational conduct.

12.7 Responses to Gender by IDAs

IDAs today show official concern on the question of gender in development. In the area of education, the "Education for All Declaration," signed in Jomtien in 1990 represented a major watershed in support of education. It introduced a commitment to much greater levels of educational funding by other agencies, and identified girls and women as key targets for educational efforts.

The importance to all levels of education expressed in international meetings such as those in Cairo, Jomtien, and Beijing has been endorsed by IDAs. Consequently, there has been a number of projects designed to support the education of girls and women.

Sida's strategies on gender and education cover a wide range, from curriculum development to remodeling of schools to make them more girl-friendly[1]. NORAD considers it fundamental to train women personnel in ministries of education in developing countries and to strengthen the connections between governments and NGOs providing educational services (NORAD, 1995). While Sida seeks to protect women, it also holds that "the responsibility for gender equalities lies with national governments (DESO, 1996; Lexow, 1996; Ehrenpreis & Johansson, 1996). The 1990 World Bank's policy paper on primary education gives priority to issues of educational effectiveness (thus paying attention to curriculum, learning materials, and classroom teaching) and equity for rural children, girls, and poor children. Specifically in the area of girls' education, the World Bank seems to make schools more accessible, to support the recruitment and training of female teachers for at least 50% of the classrooms to be constructed, to provide incentives and eliminate disincentives for girls' attendance and completion of the primary cycle, and to educate parents about the importance of girls' education. UNICEF has been concerned with gender issues over the last 20 years. It is especially concerned with girls' access to basic education, particularly in regions in the regions of Sub-Saharan Africa and South Asia.

It is evident that gender figures prominently in agencies and that educational policies focusing on gender are common. The discourse of IDAs have become more progressive and terms used within the women's movement, such as "empowerment" and "participation," are used routinely. Participation, however, is limited to the involvement of governments, thus the strongest voice of women – that of women-led NGOs – is often not at the negotiation table in country and sector agreements. Additional challenges at present include that competition that gender must face with other issues – environment, human rights, democracy, and poverty alleviation – in the design of projects. While there should be substantial complementarity among these issues, the fact that many staff members in these agencies see them as mutually exclusive in terms of resources suggests a limited understanding of how gender relates to many other aspects of social and economic life.

There is a trend among agencies to translate gender and education policies into projects with multiple components such as construction, teacher training, curriculum

[1] Making schools girl-friendly usually involves making them safer by building fences around them or providing basic hygienic facilities such as potable water and latrines.

and textbook review, community information campaigns, and girls' scholarships. At the same time, there is an overwhelming emphasis in defining problems in girls' education as essentially those concerning access to schooling. Heneveld and Craig (1996), after reviewing 26 World Bank projects in Sub-Saharan Africa to improve primary education, found that most textbook support is for publishing, printing, and distributing books; only eight projects included plans to train teachers in the use of the new books and "not one project included a reference to the supervision of the books' pedagogical use in the schools." And while 25 of the projects had components for strengthening pre- or in-service training, only eight included in-school dimensions to the training. None of the 26 projects was found to deal with issues related to school climate (teacher expectations and attitudes toward students, rewards and incentives for students, order and discipline) (pp. xiv–xiv) – issues that directly affect the lived experience of girls and boys in schools[2].

12.8 Organizational Structures Relating to Learning

At the time the IDAs were visited, all of them were going through a process of restructuring. The changes were in the direction of giving the organizations a flatter hierarchy, distributing more work across sectors, and entrusting more discretion in the hands of stakeholders in developing countries. Today most agencies have structures to call organizational attention to gender issues. The World Bank established its first gender-related structure in 1987, when a WID unit with three professionals was created (Murphy, 1995). While there were WID coordinators working at each region, it was not until 1990 that full-time slots for WID advisors were created in these regions. By late 1997, the World Bank had a central unit that provided technical assistance in the area of gender and another providing assistance in education. The original WID unit was renamed as the Gender Analysis and Policy Group, staffed with six persons, and located in the Research Division of the Bank. The Education Group of the Bank comprises 25 people. This group provides advice on the design and implementation of educational projects, which are under the supervision of regional and country officers.

Within UNDP there is a Gender in Development Program (GIDP), comprising three program officers. There is also a Gender Advisory Committee composed of "focal points" from each bureau (the geographical desks), from divisions (the substantive areas), and from gender focal points from each country to oversee program design and address implementation problems[3]. GIDP also fulfills the task of gender training of UNDP staff. Sida used to have WID specialists, including WID officers

[2] These issues certainly intersect gender, yet many IDA officers perceive them as discrete and specialized aspects of development.

[3] The role of "focal points" was established following the World Conference on Women in Nairobi (1975). The purpose of this role was to keep alive the interest on gender issues. Often, IDA officials have been given this task as an add-on to their regular functions.

at the country level. Explaining what it needed to improve integration of gender issues in its work, Sida replaced the WID officers with "social sector" consultants in the developing countries and within headquarters a number of persons have been selected as "focal points" for their respective division. NORAD has kept the features of WID specialists at headquarters and host country levels.

In looking at the variety of structures devised to address the intersection between gender and education, one observation is that perhaps the most important element is not the structure per se but what a given structure is enabled or knowledgeable to do. In many cases, individuals charged with responsibilities in gender are not given the proper training and resources. There is some indication that placing WID structures close to the institutions being supported in the developing countries increases the degree of understanding of these institutions and generates more appropriate support. This is reflected in UNICEF's claims that it is very sensitive to gender because its offices are more decentralized and present in the field, with offices outside the capital cities in such countries as India, Bangladesh, Pakistan, and Tanzania.

No commitment to allotting a fixed proportion of IDA budgets to gender issues was found in all the agencies studied, except for UNDP, which has made a decision to assign 20% of the national development assistance budget to gender.

In all, structures that assign formal responsibility for gender issues to specific individuals and that enable proximity to the field seem to be more conducive to both individual and organizational learning. Having financial resources for actual programming enables more action, and thus presumably more opportunities for learning from such efforts.

12.9 Process-Related Aspects of Learning

In this section, we discuss several processes that have had important consequences for organizational learning regarding gender and education. These include the creation of a more holistic understanding of development, the design of sectoral programs and individual projects, co-financing mechanisms, new principles affecting gender such as mainstreaming, and the provision of tools to facilitate planning and design of gender-sensitive projects and programs.

12.9.1 Training

Rare is the staff member who has been trained in the intersection of education and gender. In some multilateral agencies, many of those who work in education are not trained in this field, and even a greater proportion of those trained in education have not been trained in gender issues. For staff members who graduated from training in their fields more than 20 years ago, there is a considerable disjuncture between old and

current academic knowledge in gender issues. Notwithstanding their limited formal knowledge, most agency personnel consider themselves qualified to address gender by virtue of their use of informal sources of knowledge, a handful because they are avid readers, and a surprisingly large number of officers by virtue of "having had sisters or daughters." Often, agency officials believe that gender concerns only a few sectors, as reflected in the statement made by an energy specialist, "I haven't done much on gender in energy. But there are lots of gender issues in human rights."

Another characteristic feature of training in gender within agencies is its discontinuous and generally voluntary nature. For most staff members, gender training has been a one-shot event in the distant past, usually a 2- to 3-day workshop several years ago. It is rare for anyone in higher management to have received gender training. In the case of Sida, which has pioneered attention to gender on several fronts, training for managers usually takes the form of a 1-day workshop (Hannan-Andersson, C. 1995).

In recent years, the World Bank has been holding an annual major training event on girls' education, ranging between 2.5 and 4 days. It involves task managers talking about their projects and experiences on the subject. This training event is optional and particularly addressed to people in human development. The problem with voluntary participation in training is that it attracts the already converted. Those indifferent or unsympathetic to gender issues remain untouched by the new knowledge.

Two points can be made about agency staff training in general. The first is that most of this training has not been evaluated and no evidence has been gathered about its impact and thus possible needs for modification. Second, the lack of training of agency staff and the limited importance given to training is reflected in the manner that training itself is treated in project design. For instance, an internal evaluation – not published because of its critical findings – found that a highly acclaimed girl's education innovation in India, the creation of community-level committees with substantial female participation, had not paid much attention to training, as only 20% of the mothers in those committees had received training about their roles and about gender sensitivity (fathers, of course, received no training either).

12.9.2 Tools for Gender-Sensitive Planning and Design in Education

Despite the importance of education in improving the conditions of girls and women, none of the agencies has yet produced "tool kits" on education, much less on the intersection between education and gender, though tool kits do exist for several other sectors, e.g., agriculture, health, environment. Agency-wide efforts in both NORAD and Sida to improve the use of explicit objectives and monitoring indicators, such as the application of the Logic Framework Analysis, have resulted in intensive personnel training with these agencies and even among partner

countries. Sida, for instance, is now actively engaged in 2- to 3-day training sessions at the country level for mission and recipient staff. An observation of such a training session revealed that they promoted a cohesive internal logic for project or sector assistance design. Yet, these efforts do not address the intersection of the project logic with gender issues, or with several of the other crosscutting themes.

In some cases, the existence of guidelines may not promote the application of knowledge if these guidelines are not enforced or if they contain conflicting principles. One Sida officer stated: "I cannot follow them because there are so many and they see things from different perspectives. The headquarters writes guidelines and sends them out and that's it." Another staff member stated, "Guidelines tell you what to do but not the method. We have too many issues: poverty, gender, sustaining development. You don't know where you need to show what you have been doing. Too many policies… so you choose yourself." At UNICEF there is now a requirement that 80% of all staff must be trained on gender issues. But a problem that persists is that people who do the analysis on the basis of which a project is developed are not the same who design the project, a pattern frequently at work in World Bank projects. Though this problem goes well beyond gender issues, it makes the application of knowledge on gender difficult to include in a project because other staff in the organization, without training or knowledge of gender issues, may change it considerably.

12.9.3 WID Assistance for Better Program Design

To ensure a more appropriate design of projects and programs, IDA personnel are requested to submit their proposals to WID advisors. Further, authors of these projects are to use guidelines for gender analysis, now available in tool-kit form for several sectors. These guidelines exist in the World Bank for gender in general, but not specifically for education. At both UNDP and UNICEF there are gender guidelines and training in gender strategies to support effective gender efforts. Gender knowledge is currently supported by a computerized knowledge bank and an Intranet network of focal points in all the multilateral agencies studied. Often, however, the amount of knowledge accompanying each project is limited, as project descriptions contain primarily quantitative data.

12.9.4 Gender Mainstreaming

With increased attention to gender in development, mainstreaming has become a central concept in development agencies. Its meaning, however, varies considerably. According to some respondents, it means that gender issues should permeate every project and every sector. Therefore, it is no longer necessary to talk about projects specifically for girls or women. This group sees as the main advantage of

mainstreaming to be the development of activities that do not result in "the small women-thing on the side." According to other respondents, mainstreaming means "working toward project cycle with a women's perspective from the beginning and trying to influence all phases in the project cycle." In the minds of still others, mainstreaming means that gender issues are a constant consideration of development projects, regardless of sector and that in some instances it becomes quite important to target girls and women (see Lexow, 1996; Buvinic et al., 1996).

The mainstreaming of gender issues demands solid understanding of the role of gender in various social and economic aspects of social life in order to incorporate it strategically into the whole range of IDA work as well as into the multiple components of projects and programs. Both multilateral and bilateral agency personnel report problems when trying to mainstream. One problem frequently reported is that personnel feel that they do not have guidelines and tools to mainstream gender, especially girls' education. A second problem, noticed by UNDP staff members and several observers (Stromquist, 1995 and 1996) is that WID objectives can become invisible in mainstreaming efforts is a careful gender focus is not sustained in all phases of project design and implementation.

Some observers, notably Jahan (1995), consider that country programming (a way to bring all projects within the framework of a comprehensive national context) is one of the most promising strategies to mainstream gender issues, since country programming calls for the preparation of three instruments: the WID/GAD country profile, the WID/GAD country strategy and action plan, and a package of WID components in major sectoral projects and programs. This approach, indeed, would seem to pull together various sources of information into the preparation of comprehensive plans. The danger in country programming, however, is that, while the knowledge base may be wider, those in charge of making the decisions will mostly likely be high level officials within government. Unless special care is taken to guarantee the presence of gender specialists and women-led NGOs, it is likely that country programming – even more than regular projects – may not be gender sensitive.

12.9.5 Inter-Disciplinary and Thematic Approaches

Several IDAs are engaged in the creation of professional networks along themes rather than sector specializations. The World Bank has established professional networks on "Human Development," "Finance and Private Sector Development," " Environmentally Sustainable Development," and "Poverty Reduction and Economic Management" to promote knowledge building and sharing across the organization. At UNDP, cross-sectoral work is also being promoted through initiatives in four broad areas: poverty, democratic governance, sustainability, and gender equality. It is expected that thematic work will produce interdisciplinary efforts and beneficial exchange of information. The extent to which knowledge on gender will be distributed within these networks is not clear. It will probably depend on the expertise and authority of the individuals promoting gender analysis in those teams.

12.9.6 Co-financing Agreements

A rather recent development in international development cooperation is the growing number of "co-financing agreements" as a modality of country support. Essentially, this arrangement involves a formal coalition of agencies to fund country-level programs or specific projects. In moving into such agreements, IDAs have identified several advantages: (1) large amounts of money can be distributed easily and the coordination task is facilitated by assigning of one of the co-financing agencies to be the leading agency; (2) for both the agencies and the partner country, the umbrella of donors facilitates the request/provision of more standardized information rather than numerous separate reports; and (3) key questions can be raised in meetings and project implementation benefits from these open exchanges. The dialogue between ministers of host countries and IDA personnel is also supposed to be more equal and more focused on the particular needs of one country and directed toward mobilizing support for one issue.

How the new arrangements will impact on knowledge about girls' education is not clear. Some disadvantages may be as follows: (1) While all development agencies are equal partners in these co-financing agreements, the leading agency tends to have more authority and power. Gender and education knowledge increases if the leading agency is supportive; otherwise, gender is lost among other issues. (2) The pooled resources, characteristic of co-financing, does not allow agency members to identify either uses or impacts of their specific contributions (thus, if gender is not given proper attention, gender knowledge may not be applied). (3) Ironically, in some cases co-financing agreements tend to fragment projects into components. Since an IDA will fund generally only a specific component, it may do monitoring only on that component, even though the component may be substantively related to other end products being sought. For instance, in the case of a bilateral organization involved in a major project to improve the educational conditions of women, the officer in charge acknowledged, "We only deal with the provision of paper for textbooks; we have nothing to do with content or curriculum."

12.10 Organizational Culture

What are the values and norms of development agencies that have a substantial impact on the way gender is perceived and on the types of girls' education projects that are designed and implemented? Below we examine a number of steps being taken within IDAs to make themselves more gender-responsive.

12.10.1 Informal Sources of Learning

These can be any source not specifically established by the IDA for the purpose of important information on the subject in question. These informal and person-based

sources of learning were found to be the most common modality of knowledge acquisition among donor agencies on the issue of gender and education. A large part of this informal learning involves getting in touch with peers within the same agency as need arises. IDA officers approach colleagues during the phase of project design, as they may remember their colleagues' involvement in similar activities or recall their participation in some panel presentation. So "people you know and have a reputation within the Bank" were often mentioned by World Bank staff as sources of ideas and feedback. They also indicated that they call colleagues in other donor agencies.

What operates in these informal processes is well captured by what a Bank officer calls "just-in-time learning" – or the knowledge that is just sufficient to produce the intended report or project appraisal[4]. Occasionally, agency personnel contact consulting firms working on girls' education. Sporadic contact also involves agencies such as OECD and the Inter-American Development Bank. Networks of bilateral agencies on special themes, such as vocational education, are also a source of learning.

Contacts with NGOS and particularly women-led NGOs – a potentially rich source of learning on gender and women's and girls' education – is very limited. Only large NGOs, such as the Grameen Bank and BRAC (both in Bangladesh), seem well known. Agencies tend to exhibit both distance from and ignorance of women-led NGOs. In fact, some gender specialists in the World Bank evinced poor understanding of these women-led NGOs and made global judgments as, "The type of educational support by those groups is bad." "They are badly informed and engaged in traditional education." "The quality of their work is not very good." "The public sector has the most information."

Brown-bag lunches, particularly at the World Bank, were cited as important sources of learning. Lunch presentations are very frequent but since participation is voluntary, it is not clear who benefits from them. UNICEF and Sida staff members also rely on staff meetings and professional conferences on pertinent issues. Visits to the field are also mentioned as a prime source of knowledge. Some agency personnel, however, are mostly desk-bound. UNICEF claims that its sensitivity to gender issues is a product of frequent staff visits to the field. Often, these visits have served to make the development agency personnel much more aware of the practical and cultural obstacles women and girls face and how constraining the sexual division of labor can be for activities outside the home, including schooling. Preparation for a field visit is another occasion for learning, as program officers, specialists, and task managers review documents and recent monitoring reports.

[4] This author has visited the Bank on at least five occasions. Often, officials in this institution announce new initiatives on gender, but it is not clear their degree of actual implementation nor the impact they have.

12.10.2 Errors as a Source of Learning

If much knowledge is informal and based on experience, how do errors figure in this experiential knowledge? Many agency personnel stated that there were no penalties for making errors and that they do not face problems by admitting mistakes. But these assertions are negated by the fact that (1) agencies put a premium on "learning from exemplary projects" rather than failures, (2) evaluations presenting critical evidence generally do not receive wide dissemination, and (3) IDA personnel themselves asserted that it was prudent to let some time elapse between the error and the acknowledgment and discussion of it, suggesting thereby that revealing errors does make officers vulnerable.

Regardless of political preference, methodologically speaking is not possible to learn only from looking at successes. Since projects are "bundles of components," one fact that worked well in one setting or project will not necessarily work well in others. It is necessary to observe the behavior of various components under different conditions in order to determine their relative importance and functioning. Focusing only on successful cases can produce incorrect readings of sufficient, necessary, and contingent forces.

12.10.3 Incentives for Learning

There are few incentives to explore new knowledge in most IDAs. Although personnel may be recognized informally has "having produced a good project," there are no clear consequences linked to an individual's annual performance review. In fact, in several agencies, this procedure does not exist. In an effort to remedy this, the World Bank for the last 3 years has been providing awards for excellence in its annual personnel review.

Several development agencies use frequent regional meetings to promote reflection on past and future activities. UNICEF arranges meetings of UNICEF and non-UNICEF educators to exchange information of such issues as monitoring, communications, learning achievement, statistics, and early childhood. Sida used to promote regional meetings of country WID officers every year; these meetings were stopped 3 years ago. Over all, organizational incentives to engage in additional learning are weak.

12.10.4 Use of Research Studies

All agencies generate studies and reports. The World Bank produces the largest amount of research; it is also the agency that most tends to consume only its own products. The inward-looking nature of its knowledge production is reflected in the bibliographies that accompany its studies, which cite mostly other studies produced

by its own staff. Ironically, many of the research products of the World Bank are not always used by the operational staff. While staff linked to research units are able to identify publications sponsored by the Bank on gender and education, operational staff say that they do not use them because "there's no time to read" and "the research studies are not practical enough." Research products from academics are seldom read and not considered very useful. Even agency officers with recent doctorate degrees in both multilateral and bilateral agencies say they do not consume academic publications.

Commissioned studies prepared by consultants are considered sources of learning, particularly within UNICEF, Sida, and NORAD. These reports, however, tend to be known mostly among the staff or unit that requested them. They do not circulate widely within the institution. Agency personnel also read publications from other bilateral and multilateral agencies. Their policy guidelines, country assessments, and project descriptions and evaluations influence each other. Evaluations are also shared but in general these tend to be read by few people and have limited impact.

12.10.5 External Pressures as a Source of Learning

It is clear that in regard to gender issues in development, the work of the women's movement, particularly through the participation of women-led NGOs in international forums and the growing alliance and combination between Southern and Northern women's NGOs – now tremendously facilitated by inexpensive and fast mechanisms such as e-mail and the attachment of documents – has been a source of "learning" for agencies. This is evident in the number of bilateral and multilateral "initiatives" concerning projects and studies that shortly preceded and have followed the various international development forums, especially the Fourth World Women's Conference (in Beijing, 1995).

Various Bank staff members acknowledge that the external criticism by NGOs and feminist economists made the Bank aware that, by ignoring gender dimensions, structural adjustment programs were hurting women. External pressures are also acknowledged in increased IDA efforts to address child labor – which has substantial implications for girls' education. In this case, NGOs such as Save the Children and Human Rights Watch, and UNICEF were identified as sources of pressure to learn (which has also been called "external feedback").

12.10.6 Making the Organization More Gender-Sensitive

This is being accomplished through recruitment of personnel with gender expertise, training, and special attention to gender in programming. It is expected that the presence of a critical mass of people with expertise in gender will diffuse knowledge on this matter and thus contribute to organizational learning.

All agencies are extremely aware of the need to have more women among their professionals. In the case of the two bilaterals in the study and UNICEF, this issue has long been addressed. In the World Bank and UNDP major efforts are in place. The World Bank has charged the Senior Advisor on Gender Equality to increase the number of women professionals. The president of the Bank has appointed an Eternal Gender Consultative Group, composed of activists, feminist leaders, and academics to give him advice. The Bank has also embarked on a comprehensive project that includes increasing recruitment of women professionals, establishing a pipeline for management appointments, exploring career development, and improving the working lives of women employees that the Bank[5] (World Bank, 1999; Stromquist and Samoff, 2000).

12.10.7 Participatory Approaches

Another concept in great use among international development agencies is that of "partnership." This is being sought at various levels: with governments, local and international NGOs, foundations, bilateral and multilateral agencies, and universities. Most often, it refers to more egalitarian relations with governments. Some organizations assure that their approaches to program and project development have been dramatically influenced by the new concept. The World Bank affirms that since 1995 its organizational culture has become more client-focused, more team-oriented and more efficient (defined by some officers as offering quick delivery of the assistance or inputs the Bank provides. In the words of several Bank officers, "Government is sovereign in our negotiations. As a UN agency, we recognize national sovereignty." But other Bank officers, especially those in education, deny this reality, stating, "We are always presenting the solution. We have very few conversations [with country nationals] on how we can help people to get organized and solve their problems."

The fact that there is considerable agency intentionality in these "partnerships" could be a means to be more proactive in gender issues when negotiating with host governments. The intention to promote gender requires not only that IDA program officers be knowledgeable of gender issues but that they also be committed to putting new ideas into action, even though host governments may be reluctant to accept the initiatives. This directionality requires also that IDA personnel develop contact with community-based groups and women-led NGOs, the most likely sources of gender knowledge about the immediate environment.

[5] The concepts of "just-in-time knowledge" and "just enough knowledge" have now become part of the Knowledge Management System developed by the World Bank. A recent brochure to KMS lists them as key features of its institutional memory (World Bank, 1997).

12.11 Obstacles to Knowledge Acquisition, Distribution, and Use

Several such obstacles can be identified. Some operate to obstruct knowledge in general; others function particularly in the case of gender and education.

12.11.1 Time Constraints

Among both bilateral and multilateral agencies a factor that affects individual and organization learning is the lack of time for learning either from the existing literature or even from reflecting on one's own experience. Regardless of rank in the organization, IDA staff face serious time pressures. At headquarters, officers complain of being "inundated with work" as requests for input, participation in committees, comments on forthcoming projects, etc. take an inordinate amount of time. All staff refer to huge workloads and pressure to get them done. This work concerns "contracts, disbursements, mundane stuff." In the opinion of many staff members, there is "an enormous amount of paper processing but very little value added to the quality of the project. After projects are negotiated we do not receive many comments from anybody."

12.11.2 The Development Environment

In an organization in which it is important to spend large amounts of funds within a fixed period of time (the financial year), most effort goes to the front-end of projects. The prevailing norms are to spend the funds for "acceptable purposes"; in consequence, there is little emphasis on innovation in either procedures or content of projects. A concomitant element of exerting energy in project design and approval is that monitoring and evaluation of the projects as well as of the departments and individual staff members of most agencies is limited. During the interviews of IDA personnel, not a single staff member, at any level, mentioned self-evaluation of unit-evaluation as a source of learning. A recent analysis of the various efforts conducted within Sida to promote gender equality in developing countries corroborates this, noting that, "While the implicit strategy is that all Sida personnel should take responsibility … there are no accountability mechanisms to ensure that this actually happens. There is also little evidence of explicit monitoring and support from senior leadership" (Sida, 1996).

In development cooperation the technology regarding procedures to attain intended outcomes is not well defined. The current emphasis on "indicators" of success presupposes that levels of performance can be identified unambiguously. Yet, the terrain is full of hazards. For instance, one project addressing girls'

education identified as a success indicator a growth of 5% per year in the enrollment rate of girls in primary school. While this rate seems satisfactory at first face, it turns out that the regular enrollment growth for girls in the public education system of the country was 4.8% and that the project itself had been attaining an average growth rate of over 11% per year (Lok Jumbish, 1996, p. 126). The question, then, is how to determine the appropriate level of intensity or frequency of an indicator. This can be done only in relational terms, vis-a-vis the existing educational system. But often, indicators are accepted as having intrinsic values.

12.11.3 Fragmented Knowledge

Another feature of organizational life that blocks learning in the area of girls' education is the adoption of single-output mind frames. It was observed at various points in the case study that agencies place almost exclusive emphasis on increased enrollment as an indicator of success. The single-measure perspective prevents IDAs and governments from seeing girls' education as a multifaceted phenomenon in which several factors are simultaneously at work (requiring multiple interventions). The addition of corroborative assessments would make a project on girls' education more complicated and time consuming. But it would also make it more sound.

Many projects on gender and education continue to be predicated on a single intervention. Such is the case of the secondary-school stipend for girls in Bangladesh. A single measure is often seen as powerful enough; this was considered sufficient for several years. But recent evaluations of enrollment show that this method has been much successful than initially anticipated. Today, an increasing number of projects on girls' education consider several components, such as increasing enrollment, promoting more women teachers, providing gender-sensitive training for teachers, removing sex stereotypes from the curriculum. However, very few projects consider more than two or three simultaneous components. Moreover, there are often few mechanisms within a project to interconnect these interventions, as different governmental units are in charge of different components in the host countries. In consequence, what one component may attain and the difficulties it may encounter during implementation are not discussed in the context of the overall project.

It has become fashionable among IDAs to see the problem of the low enrollment of girls as a "demand-side factor." Framing the problem thus leads one to see the family as the main culprit and does not fully recognize that families, after all, are products of their own society and culture. Often this problem definition casts family preferences not as reflections of cultural beliefs but rather as "instances of market failure in information," caused by parents' inadequate knowledge of the changes taking place in the labor market, and particularly by the demands that urbanization and industrialization will make on women's work. These prevailing economistic views of gender tend to result in the avoidance of ideological and cultural factors in project design and in a reluctance to work with partners (e.g., women-led NGOs) who explicitly seek to create new relations between women and men.

12.12 The Promise of an Institutional Memory

One of the strongest concepts in organizational learning considers the need for an "institutional memory," in which knowledge may be available at the organizational level and easily retrievable by all members of the organization. As a living concept within development agencies, institutional memory is the object of great variability in definition. It is seen as "a system that protects people from having to start all over again," as "a set of complete files," as "individuals with experience and wisdom who become known through informal networks within the agency, and sometimes outside it," and as a feature that "had to do with learning and dissemination of knowledge." Although these definitions are not mutually exclusive, some IDA members thus see such memory as a written product while others relate it to a person-located knowledge.

Institutional memory, in the form of computerized data banks containing knowledge about gender projects, is only now beginning to be developed. Under current plans to use the computer, there are efforts to reduce research findings or project information to only a few lines of text that will be easily retrieved by asking for a pertinent keyword. It remains to be seen whether such simplified information carries much value. Most knowledge about previous projects seems to reside in project officers who develop and monitored those projects.

12.13 Evaluation

The case study on organizational learning in girls' education took us through an examination of policies, structures, processes, and cultural norms. We interrogated ourselves about the dynamics surrounding individual and collective learning and the role that managerial incentives and institutional memory play in orienting new ways of thinking about girls' education.

Much of the transformation in IDAs to address girls' education, and gender in general, has come from outside sources and outside pressure rather than through the internal realization that some elements in development assistance were missing. Agencies have responded to the environment (represented by the various world conferences addressing gender issues and their intersection with education, the influence of the women's movement, and – to a much lesser extent–the contributions from women in academia) in several ways. Structurally, they have created WID units and focal points, although the penetration of these units within the organization and their degree of authority and power have tended to be slight. Procedurally, agencies have engaged in attempts to use more multidisciplinary approaches and teamwork in the design and implementation of projects. The concept of mainstreaming of gender issues has been accepted and has been accompanied by various policy and operational guidelines to facilitate project development. Training has been provided on gender, but it has been short and voluntary. Agencies have also made substantial efforts to modify their organizational cultures by incorporating more women professionals and by including more participatory approaches with counterparts in the recipient countries.

IDAs still rely more on other IDAs' perceptions than on research findings from outside sources, notably university authors. As a result, even though development agencies engage in frequent changes in their structures and processes, their problem definition of certain issues varies little. By strengthening inter-agency contact and learning from their own limited experiences, IDAs acquire new knowledge but mostly within narrow parameters since few of these organizations tend to engage in boundary-crossing with other social actors in the developing countries. In the case of gender, an area that contests the status quo, IDAs have demonstrated a reluctance to learn the wide range of deep causes underlying power asymmetries between men and women. Often, the learning of IDAs is not theorized but rather limited to addressing a few obstacles facing women. Thus, for instance, they manifest a willingness to examine "girls' education" but not "women's knowledge." IDAs have also shown a reluctance to apply the knowledge that they do have. This may be explained not by the fact that the knowledge acquisition has been insufficiently collective, but rather by the tendency of bureaucratic routines to promote more exploitation of old knowledge than exploration of new knowledge. Coupling this with the possibility that gender efforts may create tension in the host countries, IDAs are moved to endorse a discourse that is much more promising in principle than in practice.

12.14 Conclusion

Returning to our conceptual framework of organizational learning, it can be said that knowledge acquisition among IDAs remains inward looking, as there is a reluctance to approach the women's movement to learn more about their definition of gender in society. The information distribution of gender-related materials exists in IDAs but due to organizational pressures and an organizational culture that relies mostly on informal sources of knowledge, the distribution is modest and mostly centered on specific project development, not on the acquisition of knowledge for unspecified future use. Because of their proximity to governments in developing countries, IDAs interpret knowledge about gender in limited ways. As we have seen in the case of girls' education, such knowledge frames education for girls mostly in terms of access rather than content or the lived experience within schools. Schooling is not seen as a gendered institution, and the need to modify textbooks, teacher training, and the hidden curriculum of educational institutions is pushed aside. Further, by emphasizing girls' education, priority is given to basic education as opposed to secondary and higher education (United Nations, 2007). By concentrating on girls in schools, attention to adult women in nonformal education programs also falls by the wayside.

In all, the kind of learning that goes on in IDAs can be best characterized as single-loop learning. The emphasis is on improving practices and refining rules and procedures. So far, it has not been on questioning the principles in use and reformulating new ways of understanding the social relations of gender and how these affect national development.

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Index

A
ability 19, 22, 66, 67
academic achievement 198
academic performance 41
academic standards 191
academic success 66
access 35, 37, 57, 130, 190, 191, 208
access to education 43
Accountability 136
accountability 126, 127, 130, 131, 139, 191, 192, 198
Accountability-driven models 191
accountability models 189
Acculturation 38
achievement 46, 84, 192, 194
Acker 115
Actionaid 117
active citizenship 15, 103
Adams 25, 27
adult literacy 190
adult migrants 44
Afghanistan 28
Africa 146
African education 51
a global perspective in citizenship education 110
AIDS/HIV 118
Akkari 75
Albania 153
Alex de Waal 17
Altbach 190
Althusser 77
Amartya Sen 158
Anderson 127
Andrew Duffy 133
Annette Scheunpflug 116
anomie 105
anti-colonial discursive framework 49
anti-colonial framework 52
anti-racism education 171
antiracism 167, 176, 180, 183
antiracism pedagogy 181, 183
antiracist education 176, 177, 179
Apple 28, 29, 50, 125, 139
Apple's 133
Arhar 200
Arnot 17, 103, 105, 106, 107, 108, 120
Aronowitz 125
Asgharzadeh 52
Ashton 145
Asian network of civic education 105
Astewani 160
asylum seekers 44
Atarashii rekishi kyokasyo 158
attitudes 45
Au 192
Australia 41, 43, 44, 45, 167
authority 220
Avoke 64

B
Bangladesh 206, 209, 214, 219
Barlow 130
Barlow & Roberson 128
Bayliss 162
Beck 153
behaviour 45
Behrens et al., 41
Beijing World Conference 116
Belgium 41
Belsey 81
Berge 93, 94
best practices 193, 196, 200
bilateral aid agencies 149
bilingualism 75
Biraimah 200
Bird 145

Blackmore 114, 115
Bloch 38, 44
Blumenthal 155
border pedagogy 22
Botswana 149, 194
Bourne 134
Brazil 40
Breines et al., 118
Britain 92
British Council 149
British Overseas Aid Group 113
Britzman 168
Brown versus Board of Education 191
bullying 42
Bunch 104, 117
Buvinic 212
Byrne 28

C
Calton 158
Canada 41, 43, 46, 53, 56, 92, 125, 130, 167, 172
Cantonese 74
capitalism 197
capitalist gender 115
Carey-Wood 35
Carol Pateman 106
Carter 169
Castles 34, 38
Catch 22 155
Central Africa 146
Central and Eastern Europe 146
Central Asia 146
Cheung Man-kwong 80
China 28, 40, 148, 158
Chinese 74
choice 200
Christian Global or Development Education 113
Christianity 63
citizenship 105
Citizenship education 20, 118
citizenship education 24, 103, 105, 109
civic curriculum 121
civic education 105
civic education programmes 108
civics education 24
civic virtues 108
class 53, 54, 66, 67
class conflict 26
class hierarchies 115
Cochran-Smith 167
Cockburn 21, 27
Cogan 105, 110
Colic-Peisker 33
collective identity 63
Collier 17
colonial 52
colonialism 63
colonialism models 190
colonial language 73
common citizenship 51
communitarian models of citizenship 111
compulsory schooling 40
conflict 22
Connolly 21
Consensus democracy 18
consumerism 20
Convention on the Rights of the Child (CRC) 35
Cook 80
cosmopolitan citizenship 111
Coulson 198
Council for Education in World Citizenship 110
Council of Europe 146, 154
Craig 208
Crane 128
creativity 193
Crichlow 170
critical pedagogy 22, 28, 30
cross-border families 161
cross-border identities 146
cross-cultural learning 180
Crowley 79
Crystal 72, 75, 83
cultural 173
cultural capital 133, 139
cultural differences 49, 97
cultural identity 36, 39
culturally responsible pedagogies 197
cultural stereotyping 184
Culture 205
culture 53
Cummins 82
Czech Republic 153

D
Dakar 36
Dakar Framework 113
Dale 126
Davidson-Harden 126, 148
David Watt 133
Davies 15, 16, 17, 19, 26, 28, 144, 145
Davis 196
Day 37

Day-Vines 191, 192
decentralisation 18, 25, 162
decision-making 19
deculturalization 73
Dei 51, 52, 63, 168, 183
Dei et al., 56, 58
Delanty 111
deliberative democracy 23, 24
De los Reyes 89
Democracy 21
democracy 16, 17, 18, 26, 160, 207
democratic education 49, 50
democratic governance 212
democratic rights 65
Democratic schools 15
democratisation 28
Derricott 105, 110
development 119
diagnostic assessment 44
Dillabough 120
Dillabough & Arnot 115
disability 53, 64
disadvantaged students 132
Discrimination 95
discrimination 92, 107
disempowerment 37
diversity 21, 51, 65, 97, 99, 167, 178, 180, 182, 191, 193
dominant class 57
dominant discourses 65
Donald 121
Donkova 159
Draft Code of Good Practice for the Provision of Transnational Education 155
Dropout rates 128
Dryden 37
Duffy 134, 137
DuGay 75
dyslexia 154

E

EBA (economic-bureaucratic accountability) 127
economic immigrants 137
Eduards 91
educational attainment 41
educational ideology 162
educational opportunities 43
educational outcomes 41, 195, 197, 200
educational performance 33
educational policies 207
educational policy 144
educational reforms 203
Education as a Glance 130
Education for all' (EFA) 149
Education for All Declaration 207
Education for All or No Child Left Behind? 193
Education for democracy 27
Education for International Understanding 147
education planning 143
education policies 207
egalitarian discourses 107
Ekberg 91
elitism 106
Elster 23
employment 44
Empowerment 37
empowerment 28, 42, 46, 207
England 139
English 73, 74, 192, 193
English and Welsh Citizenship Curriculum 111
English and Welsh citizenship education 105
English as a Second Language 134
English Citizenship curriculum 107
English citizenship curriculum 109, 120
English citizenship education 110
English proficiency 74
environment 207
Environmental and Sustainable Development 113
EPA (ethical-professional accountability) 127
equality 17, 18, 118, 127
equal opportunities 107
equitable aid policy 149
equitable language policy 58
equity 16, 19, 40, 49, 50, 65, 90, 115, 140, 143, 153, 156, 157, 160, 162, 167, 181, 182, 191
equity goals 94
equity issues 89, 144
Erickson 173
ESL students 135, 137
ESL teachers 135, 137
essential life skills 190
ethnic 173
ethnicities 50
ethnicity 41, 54, 55, 66, 67, 89, 91, 98
ethnic minority groups 97
European Union (EU) 143
excellence 51
exclusion 64

F
Fanon 52
Fante 59
Fay 75
female citizenship 114
femininity 119, 204
feminist politics of citizenship 120
Finland 38
Fishkin 23
Florida 199
Florin 92
Foucault 52
France 41, 42, 92, 145
freedom 160
Freire 37, 50, 77
Froese-Germain 130
Fusarelli 191, 192

G
Gambia 20, 26
Garmarnikow 105
gay men 109
Gender 60, 108, 113
gender 22, 50, 53, 54, 61, 62, 66, 67, 89, 91, 92, 98, 104, 106, 115, 116, 203, 204, 207, 209, 211, 216, 219, 220, 221
gender changes 110
gender differences 93
gender dimensions 216
gender equality 91, 93, 99, 104, 106, 190, 212
Gender in Development Program 208
Gender inequalities 113
gender inequality 204
gender issues 61, 103, 208, 210, 212, 216
gender justice 119
Gender knowledge 211
gender needs 62
gender patterns 93
gender politics 91
Gender relations 120
gender role difference 108
gender strategies 211
generational differences 108
George Santayana 160
Germany 41, 156
'*Get Global*' project 113
Geuss 77
Ghana 49, 53, 58, 61, 64, 66, 67
Ginsburg 17
girls' education 206, 207, 208, 210, 212, 213, 218, 219, 220
Giroux 22, 50, 53, 125
Glaser 173
Global/Global Citizenship Education 113
Global citizenship 110
global citizenship agenda 121
global citizenship educatio 111
Global citizenship education 114
global citizenship education 103, 104, 110, 112, 117, 121
global citizenship pedagogies 113
global civic education programmes 120
Global context 143
global economy 75, 140
global education 116
Global Education Network Europe (GENE) 116
global education project 113
global gender inequalities 114
global gender issues 112
Globalisation 20, 114
globalisation 15, 18, 25, 110, 116, 144
globalisation of accreditation 155
globalising world 145
global qualifications 154
Goertz 192
Goethe Institute 149
gold standard 195
Goldstein 193
good citizen 24, 107
good citizenship 109
Gordon 119
Gould 91
Graham 144
Green 105, 144, 145
guest workers 139
Gunderson 137
Gustafsson 91
Guttman & Thompson 23
gymnasium 93

H
Habermas 38
Hall 153
Hällgren 98
Hannah 36, 44, 45
Hanson 109
Harber 15, 16
harmony 147
Hauptschule 41
Heater 104, 105, 106, 110, 111, 121
hegemonic alliance 130
hegemony 62
Helms 169, 175, 182
Helms' model 169

Heneveld 208
Henry 115, 116
Hetty Roessingh 133
hidden curriculum 189, 221
high-stakes testing 191, 192
higher education 130
Hirdman 92
history textbook 158
HIV/AIDS 143
Hodgkins 150
Holland 139
Hong Kong 40, 71, 72, 73, 75, 76, 80, 81, 83, 84
hooks 51
Howard 53, 170
Huber 205
Hui 83
human capital 140
human capital theory 197
human rights 17, 106, 107, 110, 111, 118, 121, 143, 207
Human Rights Education 112
hybridity 21

I

ICT skills 154
identities 175
identity 20, 26, 119
Identity Building 20
identity politics 22, 117
ideologies 197
ideology 49, 77, 143, 162
Illich 37
illiteracy 158
immigrant 34
immigrant children 153
immigrants 137, 138
Immigrant students 132
immigrant students 134, 140
immigration 97
inclusion 46
inclusive curriculum 140
inclusive schooling 57
India 15, 206
Indicators 130
indigenous pedagogies 197
individual identity 21
individualism 20
Indonesia 40
inequalities 59
Inequality 115
inequality 22, 73, 129, 189
inequity 147, 183
Institute Française 149
integration 37, 38
Integration policies 39
integration process 33
integration trajectory 46
Inter-American Development Bank 214
interdependence 29
International Christian University 147
international development agencies 203
international education 149
international league tables 152
international students in UK 20
interruptive democracy 15, 19, 21, 23, 27, 28
Iran 148
Iraq 160
Islamic Colleges 158
Islamic schooling 145

J

Jahan 204, 212
Japan 130, 145
Jaquette 204
Jewish national identity 20
JICA 149
Jobbins 148
Jones 80
Judaeo-Christian 107
justice 118

K

Kabeer 204
Kaplan 95
Kelley 76
Kelly 190
Kenway 118
Kenya 149
Kilbourn 78
Kincheloe 55
King 119
King's 170
Klein 16
knowledge control 195
knowledge society 99
Kohn 128, 129
Koran schools (McCarthy 158
Korea 27, 146
Korsgaard 98

L

Lahdenperä 96
Langmead 118

language 44, 53, 54, 66, 67, 72
language education 78
language policies 74
Language proficiency 43
language proficiency 192
language schools 149
Lather 196
Leach 119
learner-centered pedagogy 194
learning contracts 20
learning difficulties 41
learning outcomes 190, 194
Lee 163
Lees 109
Lesbian 109
Levine-Rasky 183
Lexow 212
liberal discourse 62
life-long learning 157
life chances 189
lifelong learners 40
lifelong learning 46
Linda McNeil 129
lingua franca 73
Lisbon Convention on the Recognition of Qualifications concerning Higher Education in the European Region 154
literacy 44, 190
literacy test 132
Little 154
Lok Jumbish 219
Lundh 90
Lustick 23
Luxembourg 41

M

MacKenzie 159
Majhanovich 126
malnutrition of girls 118
market driven models 189
Marshall 17, 103, 112
Marsh et al., 74, 76
Martin Carnoy 144
masculinity 204
Mason 155
mathematical 40, 41
McCarthy 168, 170
McDonaldisation 18
Mclaren 50
McMahon 16
McNeil 129
Memmi 52
Mexico 203
Mezirow 38
Michael 83
Michael Apple's 129
Middle East 28, 146
migrant populations 41
Migrant Resource Centres (MRCs 44
Migrants 35
migrants 33, 37
migrants' children 42
migration 33
Migratory movements 45
Millennium Development Goals 113
minority 67
Minority ethnic groups 105
minority groups 132
minority schooling 67
Minority students 66
Miodownik 23
Mishler 78
Monkman 114
moral values 109
Morrow 120
Moser 204
mother-tongue education 71
mother-tongue medium of instruction 76
mother tongue 73
multi-layers of globalisation 115
multicultural" curriculum 180
multicultural education 178
multiculturalism 96, 183, 193
multiethnic society 94
multilateral agencies 206, 211
multiple citizenships 111
multiple identities 175
Murphy 29, 132
Muslims 63, 158
My Fair Lady 82

N

nation-state 144
national identities 173
national identity 182
Nationalist discourse 67
national unity 51
nationhood 51
Native-English Teaching Program (NET) 80
Ndofor-Tah et al., 43
Nee 39
Neft & Levine 91, 92
neo-liberalism 105
neocolonial 189
neocolonialism 190
neocolonial perspective 190

neoliberal 189
Netherlands 41, 130
new-right discourse 129
Newell 150
New Zealand 41, 139
Ng et al., 76
Nielsen 77
Nilsson 92
Nira Yuval-Davis 114
Noddings 108
non-English speaking students 135
Non-Governmental Organisations 36
NORAD 207, 209, 210
Northern Ireland 147
North Korea 148
Norway 95, 148
numeracy 190
numeracy skills 44
Nussbaum 111, 120
Nuthall 154
Nygren 90

O
Obiakor 192
OECD 33, 130, 214
Öhrn 94
Oliga 76
Omi 168, 185
Ontario 125
Ontario Secondary School Teachers' Federation 128
organizational learning 204, 205, 216, 220, 221
Oryema 146
Osler 110
Oxfam 111, 112, 149
Ozacky-Lazar 20

P
Pakistan 209
Palm 92
pan-European identity 146
Parakrama 81
parents 41
Parry 159
Patrick 109
patriotism 29
Patton 191, 192
Paul Stares 158
peace 29, 118, 147
peace education 15
pedagogy of difference 65
Pennycook 73, 76, 83
People 148
People and Skills in the New Global Economy 125, 126
Peru 40
Peterson 37
Pettman 27
Phillips 191
Phillipson 79, 83
Plato's Republic 75
political globalisation 115
Popham 127, 128, 129
Portelli 51
Portelli & Solomon 50, 65
Porter 25
post-apartheid South Africa 157
post-colonial 51
post-colonial' education 51
post-colonial' Ghana 55
post-colonial era 76
post-compulsory education 43
poverty 115, 212
poverty alleviation 207
poverty reduction 111
power 104, 157, 162, 220
power dynamics 52
power relations 92
practices 197
private schools 147
Private universities 147
privatization 136, 199
Programme for International Student Assessment (PISA 40
Pygmalion 81, 82

Q
qualifications 43
quality 83, 152, 189, 191, 194
quality education 190, 197, 198
quality of education 176
quality research 200
quality teaching 200
Quebec 131

R
race 22, 115, 167, 185, 192
racial 173
racial difference 171
racial differences 174
racial diversity 181
racial identity 168, 169, 171, 172, 185
racial identity development 175

Racial Identity Development (RID) 184
Racial Identity Development Model 175
racial inequalities 168
racism 42, 97, 98, 99, 167, 168, 171
racist attitudes 174
Racist beliefs 97
reading 40, 41
reflexivity 25
refugees 33, 35, 37, 44, 105
religion 53, 62, 63, 66, 67
religious differences 54
Republic of Congo 149
Rezai-Rashti 167, 168
Ricci 132
Richardson 109
rights 19
Rihani 18
Robert Fisk's 147
Robertson 126, 130
Robertson-Baghel 170
Robinson Crusoe 78, 82
Roche 84
Rod Paige 192
Roessingh 133, 137
rolling 143
rolling equity 161
Roma children 146
Rudiger 39
Runfors 97
Russia 158
Russian Federation 40

S

Sanders 39
Save the Children 149
Schellekens, 2001 43
school-focussed ideologies 161
school climate 208
school community 21
school effectiveness 143
school improvement 200
school standards 139, 159
Schugurensky 126, 148
scientific literacy 40, 41
Scotland 44
Sears 136
self-esteem 19, 169
self-identity 25
Self-knowledge 38
Self-Reliance Strategy (SRS 37
Semali 55
sexual abuse 19
sexual contract 106
sexual division of labor 204
sexual exploitation 117
sexuality 91
Shahjahan 63
Shaw 81
Shiva 66
SIDA 149
Sida 210, 218
Siegel 137
Sinclair 36
Singapore 73
Smith 52, 162
social 'equality 105
social capital 105
social class 91, 120
social contract 106
Social Darwinism 130
social differences 173
social equity 192, 200
social exclusion 41, 46
social inclusion 40, 43
social inequality 190
social justice 49, 65, 111, 115, 140, 167, 200
social justice issues 182
social power 49
Social Sciences and Humanities Research Council of Canada 134
Social Sciences and Humanities Research Council of Canada (SSHRC) 53
socio-economic class 50
socio-economic factors 46
socio-economic status 41, 132, 134, 139
socioeconomic classes 56, 191
socioeconomic groups 193
Solomon 51, 183
Solomon's 169
Somali 38
Somalia 148, 149, 150
South Africa 147
South Korea 156
Specialist Migrant Placement Officers (SMPOs 44
special needs 22, 146, 156
Spencer 39
Spretnak 83
Sri Lanka 147
standardised tests 40
standardized "high-stakes" testing 127
standardized testing 129, 133, 139
Standardized tests 128
standardized tests 127

Steffy 192, 193
stereotypes 61, 174
stratification of education 197
Strauss 173
Stromquist 114, 204, 212
student mobility 154
student protest 27
Sub-Saharan Africa 208
sub-Saharan Africa 114
subject-oriented knowledge 38
Sudan 149
Sue Lees 109
Sunderman 191
Sunnari 118
supra-national identities 161
Susan Traiman 192
sustainability 212
Sweden 94, 99
Swieringa 204
Switzerland 130
systemic racism 139

T
Tabulawa 194, 197
Tanzania 209
Tatum's 169
Taylor 132
teacher expectations 208
technical/instrumental 38
Thai curriculum 146
Thailand 27, 40
the colonial language 59
the Council of Europe 105
the English/Welsh model of citizenship education 103
the labour market 39
the language of assessment 41
the Ontario Secondary School Literacy Test 131
The UK Race Relations Act 153
The World Bank 212
Third Way politics 105
Thomson 169
Tibet 161
TIMSS (Third International Mathematics and Science Study) 130
tolerance 118
Tollefson 73, 77
Torres 120
Trafford 26
Tsui 73, 74, 76, 77
Turner 106

U
Uganda 37, 146
UK 20, 44, 45
UN Convention on the Rights of the Child 148
UN Declaration on Human Rights, the Convention on the Rights of the Child 150
UNDP 208, 212
UNESCO 16, 21, 28, 113, 116, 154
UNESCO's Education for All (EFA) 189
UNESCO Convention against Discrimination in Education 153
UNESCO Convention on Discrimination in Education 147
UN Human Rights Declaration 155, 157
UNICEF 113, 211, 214
United Nations Development Fund for Women (UNIFEM) 118
United States 41, 91
United States' *No Child Left Behind* (NCLB) 189
universal' education 144
Universal Primary Education' (UPE) 149
UN Millennium Development Goals 110
Unterhalter 118
Unterhalter's 116
US 56
USA 92, 147, 150
USAID 160

V
Vallet and Caille's 42
Vé 94
Verma's 167
Vincent 110
vocational education programs 132
vouchers 199

W
Walters 160
Wardlaw 80
Watt 133, 137
Waxman 33
Weiner 93
Western-style education 193
Westernization 194
Western pedagogical models 190
Wiersdman 204
Williams 16, 26, 145, 158, 159, 163
Winant 168, 185

Woods 26
Working-class boys 94
World Bank 113, 116, 126, 207, 210, 211, 214, 215
World Education Forum 36
World Studies 112
World Trade Organisation General Agreement on Trades and Services (WTO/GATS) 144
World Trade Organization 126

X
xenophobia 42

Y
Yuval-Davis 22

Z
Zajda 17, 20, 50, 126, 144, 161, 194
Zajda et al., 19, 49, 140, 161, 194, 200
Zeichner's 167
Zetter 33, 34