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## Editorial

We present a thematic issue dedicated to comparative education. As the Editor of this volume, I would like to thank the outstanding Authors who wanted to share their passions and scientific explorations that constitute this thematic issue. I hope that the problems discussed in it will interest readers and make comparative education an inspiration for other researchers interested in the world and its cultural diversity.

The volume opens with papers by Zbyszko Melosik, Jerzy Nikitorowicz, Bogusław Śliwerski, Agnieszka Gromkowska-Melosik, Ewa Ogrodzka-Mazur & Anna Szafrńska, and Renata Nowakowska-Siuta, presenting the contemporary debate on the condition of social sciences and the place of comparative pedagogy among the numerous subdisciplines of pedagogical sciences. Thanks to these papers, we learn that, as in other subdisciplines of social sciences, different methodological approaches were considered in comparative education in various periods of its development.

A closer look at the various developmental phases reveals that each phase has produced a different type of work that depends mainly on the dominant views and motives of comparative education studies. Beginning with simple traveler tales about education abroad, methodological approaches to comparative education have gradually evolved to using sophisticated and complex social science methods, most of them empirically based. With the ever-increasing number of researchers undertaking international research in pedagogy, resulting from the multidisciplinary nature of comparative studies, scholars have yet to agree on a universally accepted research method. There is a lot of debate and opinion about which method is best to use. In this regard, the methodological approaches used in comparative education are increasingly divided into two broad categories: traditional and modern. Within the traditional approach, we deal with descriptive and historical methods. The modern approach uses sociological, analytical, and synthetic approaches. One may also come across the view that there is no specific methodology for comparative education and that pedagogical comparison is only a method used in the social sciences.

Further texts by Katarzyna Górak-Sosnowska & Anna Odrowąż-Coates, Agata Cudowska, Anna Mańkowska, Jan Heystek & Joanna Madalińska-Michalak, Tomasz Gmerek, Bogusław Milerski, Małgorzata Kupisiewicz, Katarzyna Mroczyńska & Tomasz Michta, Marta Bodecka-Zych show the educational problems of the contemporary world, system solutions for

schools found around the world. The manuscripts by Rafał Piwowarski, Inetta Nowosad & Roman Dorczak are the authors' reflections on quality assurance in educational systems and the need to consider the socio-cultural context in comparative research. The volume ends with a text by Aleksandra Rzyska, which shows the importance of comparative education in today's social sciences.

Science is what we can discover using the scientific method: the truth, or at least an approximation of it. An unstated rule in logic and mathematics is that one should use as few words as possible to represent the world. Therefore, it should not be surprising that the philosophy of science has its roots in the positivist way of understanding reality. The philosophy of science in the 20th century, especially in the years 1930–1960, as Jan Woleński writes, was dominated by a formal orientation (reconstructionism) derived from logical empiricism and recommended the study of scientific products (theories, laws, hypotheses, conclusions about experimental results, explanations, predictions, as well as linguistic means of coding scientific statements) using formal and logical methods (Woleński, 2014, *Filozofia nauki a historia nauki*, [Prace Komisji Historii Nauki PAU, t. XIII], Kraków). It was assumed that a strict criterion distinguishes science from what is not science. According to supporters of formal methodological orientation, science always manifests itself in the same way, regardless of the historical period. The main object of research in the field of science is scientific products, not scientific activities, and the context of justification is essential, not the context of discovery. This justification, as evidenced by the dissertations in this volume, always has an original, authorial approach anchored in scientific biography, knowledge, and curiosity about the world.

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*As the Editor of this volume, I would like to dedicate it to the memory of an outstanding scientist, pedagogue, didactician, historian of education, and comparativist: Professor Czesław Kupisiewicz (1924-2015) on the hundredth anniversary of his birth.*

Editor of the volume  
*Renata Nowakowska-Siuta*

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## **Comparative education: the status controversy and dynamics of scientific development**

**Abstract:** The article addresses the problem of identity and status of comparative education in contemporary science, as well as its developmental dynamics and scientific potential. In its first part, the author reconstructs the debate on the ‘crisis’ of comparative education and also the various avenues of its critique, especially, but not exclusively, in the context of its relationship with other (sub)disciplines. Part two focuses on the developmental dynamics of comparative education, against the background of the discussion regarding the various criteria and aspects of estimating the state of (sub)disciplines. Thus, the theoretical and methodological openness of comparative education and its responsiveness to social change will be presented. Furthermore, comparative education is placed in the context of the debate between essentialism and scientific constructivism, the problem of interdisciplinarity and research integration, the density paradox or the narcissism of small differences, as well as the challenge of postmodernism. The final section of the text presents the idea of a comparative educator as a traveller and its potential to transcend one’s own epistemological script.

**Keywords:** comparative education, identity, scientific status, theory, developmental dynamics.

### **A crisis of the identity and status of comparative education?**

The tradition and research potential of comparative education appear to be particularly rich and undeniable, however, the debate over its status has been continued for decades, through the recurring cycles of the same

questions and problems. There have been further (and further) attempts made to identify or reconstruct its identity. Therefore, in the first part of my text, I will try to capture the phenomenon referred to as the 'crisis' of comparative education, and in the second part I am going to present its broad academic range of possibilities.

A few threads can be distinguished in the arguments critical of the (lack of) identity and status of comparative education. The first one refers to the un(sufficiently)-specified problem area and research methods exposed by its critics. At this point one may quote, after C. C. Wolhuter, David Wilson's thesis from 1996 (he was a former president of the 'World Council of Comparative Education Societies') concerning the prosopagnosia of comparative education. In psychology, the term prosopagnosia describes the inability to recognise faces; in this case, however, it illustrates the belief that comparative education does not have its 'clearly recognized face or identity' (Wolhuter, 2015, p. 11). Comparative education is also referred to as an amorphous (featureless, structureless) area of research (Wolhuter, 2008, p. 323). C. C. Wolhuter also wrote about the 'identity crisis of comparative education,' based on the fact that it is 'conceptually difficult to define' and its object of study is 'extremely broad'. He recalled the claim of Ervin H. Epstein and Katherine T. Carroll who referred to it as an 'eclectic/diverse field with adjustable borders and contours which are difficult to demarcate' (Wolhuter, 2015, p. 16). C. C. Wolhuter also wrote that comparative education has an 'empty interior' (Wolhuter, 2015, p. 26).

The second thread of criticism against comparative education addresses its relationship to other subdisciplines among broadly understood educational and social sciences. Two contradictory starting points of consideration can be distinguished here. As early as 1974, Laadan Fletcher wrote that in the debate on comparative education, a concern has been expressed that it failed to have a 'generally recognised affiliation with any major discipline'; and he considered it to be an 'anomaly'. He argued that while subdisciplines such as history of education or philosophy of education have an 'immediate identification' with reference to the 'canons of scholarship' of their respective disciplines, comparative education seems to exist – if I may use the metaphor – in a kind of disciplinary vacuum (Fletcher, 1974, p. 348). However, the second starting point of criticism is quite different; it stems from the conviction that comparative education does not have its own theories and research methods. It is therefore not autonomous, as it must inevitably draw on the contributions of other sciences, most notably sociology, history, economics, political science, philosophy as well as law and psychology.

Contrary to Laadan Fletcher, another well-known theorist Philip G. Altbach argues that ‘because education itself has no standard methodology (...) comparative education has in recent years generally oriented itself to the social sciences – and in earlier periods, to history or philosophy’ (Altbach, 1991, p. 492). As David A. Turner puts it: ‘the concepts and methods of comparative education were, therefore, dependent on external reference to other, foundation disciplines for their legitimacy’ (Turner, 2019, p. 14). Alexander A. Wiseman and Nikolay Popov propose a thesis that comparative education borrows or adopts theories and methodologies from the disciplines of the social sciences, while there are virtually no instances of its own contributions being used, for example, by sociology or political science (Wiseman and Popov, 2015, p. 4). We definitely witness an ‘asymmetry of influence’ here. Thus, for this reason specifically, the words of Harold Noah and Max A. Eckstein are quoted at times, arguing that the identity crisis of comparative education stems from its eclecticism, (Fletcher, 1974, p. 353).

The aforementioned C. C. Wolhuter claims that all classifications of the approaches within comparative education contain an ‘impressive kaleidoscope’ of theories, however, they have ‘their origin outside Comparative Education’, for example in economics (human capital theory) or sociology (economic or cultural reproduction theory) (Wolhuter, 2015, p. 30). The latter further wrote: ‘This creates the impression that Comparative Education is at its best some exercise in applying theories from other disciplines to education, not a fully-fledged scholarly field or discipline in its own right’ (Wolhuter, 2015, s. 31).

It is worth adding that the discussion about comparative education is a part of a broader one – concerning the status of pedagogy as a scientific discipline. The basis for the unjustified, in my view, critical assessment of pedagogy in this respect is the belief, expressed by i.a. Richard Peters, that it is not an ‘autonomous discipline’ but a ‘field’ in which other disciplines, most notably philosophy, psychology and sociology, find their application (McCulloch, 2002, p. 100).

Another problem associated with the crisis of comparative education is exposed by Euan Auld and Paul Morris. They draw attention to the fact that it is often reduced to its sole ‘applied’ function – as a ‘provider’ of data for optimising the educational policy. Following this line of thought, it can be said that understanding the applicability of the experiences or educational achievements of one country to other countries is an inherent part of the tradition of comparative education. However, it is now more often reduced to nothing but collection of comparative statistical data (especially in terms

of pupils' achievements) to provide an almost 'mechanical' starting point for a change in the educational policy of a particular country. The traditional analyses of historical and cultural differences between the country from which the experiences have been 'borrowed' and the country in which they are implemented are neglected in this context. The 'explanatory' function of comparative education is then less significant while its applicative function becomes considerably more substantial. It is pragmatically assumed that what 'works' in one country or system will certainly work in others. Euan Auld and Paul Morris emphasise that comparative education loses, therefore, its academic dimension, the reason being its abandonment of the analysis of epistemological, theoretical and methodological problems. The comparative analyses, mainly statistical ones (rather than qualitative), become, to reiterate, only an instrument of educational policy (Auld and Morris, 2014, p. 130).

Comparative education is then transformed into a 'servant' subdiscipline, which aims to contribute to the ability of a given society and its economy to succeed in the global competition, with the younger generations being reduced to human capital in such comparativism (Auld and Morris, 2014, p. 135). The comparative research is then incorporated into a simplified technocratic assumption: 'Everything can be measured. And what gets measured, gets managed' (Auld and Morris, 2014, p. 137).

According to the critics, who cite the views of Sarah Igo, in such actions we face the embodiment of the idea of a 'statistical community' (Espeland and Stevens, 2008, p. 413), where 'quantitative measures are a key mechanism for the simplifying, classifying, comparing, and evaluating that is at the heart of disciplinary power' (Espeland and Stevens, 2008, p. 414). The groups numerically scaled are able to be 'monitor[ed] or governed "at a distance"' (Espeland and Stevens, 2008, p. 415). In such a situation, comparative education constitutes an instrument of power, using indicative measurement to implement the desired changes in education – from an economic, ideological or political perspective.

The most common occurrence, in the practices described above, is the isolation of Western values and 'epistemologies' from the cultural system, for which they are 'relevant' (in the sense of growing out of its traditions and culture). They thus acquire an 'independent life', are 'exported' and used as a 'metanarrative structure' for the comparative analyses of different societies and cultures. What becomes obvious therein, is that the comparative patterns, which are the product of Western culture, by no means express the models and values of other cultures. The language of totalisation and the cognitive habits of the West will – in the course of the comparative

procedures – assimilate distinct local realities. The comparative education then becomes an ‘imperialist’ comparative education (Melosik, 1995, p. 280).

Also Robert Cowen wrote in 2018 about the progressive redefinition of comparative education: its aim becomes more and more to define the conditions for the ‘transfer’ of educational experiences (both the ideas and the practices of education) (Cowen, 2018, p. 20). In relation to the above, he writes explicitly that he finds it ‘professionally embarrassing’ for the academic comparative education to have professors from that subdiscipline increasingly involved in ‘doing comparative education’ through non-academic research and consultancy contracts. Hence, it is necessary ‘to distinguish various forms of “applied” comparative education from academic forms of comparative education’ (Cowen, 2018, p. 20).

### **Multidimensionality and ambiguity as the sources of developmental dynamics of comparative education**

It is important to emphasise that many theorists believe – and I completely agree with their stance – that the ambiguity of the theory, methods and problem area of comparative education is not a limiting factor; on the contrary, it determines its scientific openness and potential. Thus, the lack of demarcation of its boundaries, the absence of a clear theoretical or methodological core, and the borrowing of diverse methods from the disciplines of social sciences or humanities may constitute the source of vitality of comparative education.

Comparative education is therefore an ‘open’ subdiscipline, ‘interested in’ or rather ‘inquisitive’ about the multidimensional, multidisciplinary contexts of the reality of education. It is heterogeneous in its nature. As early as 1974, Harold J. Noah wrote about the need for a range of diverse approaches in comparative education. He stated with confidence: ‘none may claim monopoly on truth’, ‘The task of the scholar (...) is to recognize which approach gives the most useful results for a given purpose and in a given situation’ (Noah, 1974, p. 344). Whereas Phillip G. Altbach wrote in 1991: ‘Comparative education looks at many directions at once, and this has helped to shape the field that at the same time is left without a clearly defined centre’ (Altbach, 1991, p. 491). Comparative education also has a ‘borderland’ aspect in all its dimensions. And this so-called ‘borderland character’ by no means has to be a destructive factor in relation to this subdiscipline, on the contrary – it may be a factor of its scientific potential and developmental dynamism. Borderland character allows for a growing research focus and differentiation of approaches of comparative education. Hence, to refer now

to the reflections of Robert Cowen, comparative education is a very 'exciting' research area, 'rewarding and flexible' (Cowen, 2008, p. 18). In relation to this subdiscipline, particularly accurate is the statement by Rudolf Stichweh that 'One of the most interesting features of modern science is exactly that it gains an almost unlimited capacity for *self-activation* through its internal differentiation (...)' (Stichweh, 1992, 12).

One can also refer here to the words of Steven J. Klees from 2008, when he proudly stated that 'The principal comparative advantage of comparative education is that the field is literally constituted by crossing borders, and comparative educators, by necessity, roam far beyond education itself'. He reasoned that no other area of science 'has such a broad, interconnected vantage point [with other disciplines] from which to view the dilemmas of our time' (Klees, 2008, p. 302). Certainly, one should also agree with the thesis by W. James Jacob and Sheng Yao Cheng that the fundamental distinctiveness of the theories used by various comparativists is not an expression of weakness of comparative education. On the contrary, the existing 'dynamic variety' is the foundation of its 'comparative and theoretical strength' (Jacob and Cheng, 2005, a. 230). The authors even wrote about 'the power of theoretical synergy', which is made possible by the use of diverse and increasingly more recent theories and methods in comparative education (Jacob and Cheng, 2005, p. 245). It is therefore argued, with some validity, that 'that there is no single or unified <<comparative education>>, but that there are multiple comparative educations' (Wolhuter, 2008, p. 323-324)

Also Robert Cowen discussed the above, although from a slightly different perspective: 'There is not one comparative education but several. For example, there are different epistemic traditions, within educational studies, which affect how scholars in Canada, Denmark, Germany, Italy, Japan, Spain, the United Kingdom and the USA construct comparative education' (Cowen, 2018, s. 16). On the other hand, however, one can also notice 'centripetal forces' in comparative education, in favour of convergence, integration, coherence – a search for a 'disciplinary identity' (Wolhuter, 2008, p. 324) (also in the context of the efforts of international comparative associations and journals in this regard). And this dynamic, created by the pursuit of an unambiguous self-identification of this subdiscipline and the parallel phenomenon of its decentralisation or fragmentation, is certainly pro-developmental.

Similarly, the growing tendency to move beyond traditional comparative schemes in comparative education is firmly in favourable to its development. Back in their text from 1980, Francisco O. Ramirez and John

W. Mayer complained that ‘for the most part (...) research in “comparative education” consists in studies of education in individual countries, with few direct comparisons’ (Ramirez and Meyer, 1980, s. 369). Nowadays, direct comparative research between countries is even ‘routine’, as reflected in hundreds of books and thousands of articles. It appears, though, that what can be observed today is an increasing move away from – as Alexander W. Wiseman and Nikolay Popov put it – ‘methodological nationalism’, the essence of which is to compare nation states as ‘national societal units of analysis’ and to ‘create national models’; often at the expense of internal diversification within these nation states (Wiseman and Popov, 2015, p. 8). Comparative research is becoming increasingly multidimensional and complex, encompassing a variety of phenomena ‘across’ and ‘within’, and state/nationality is often only one of the factors accounted for.

At this point it is worth reiterating the views of the British comparativist Robert Cowen on the essence and objectives of comparative education. He emphasises the significance in this context of the ‘international mobility of ideas, discourses, institutions and practices’, in terms of three theoretical categories: transfer, translation and transformation. While transfer refers to the very act of their movement across different types of boundaries, translation refers to their re-interpretation and transformation refers to their ‘changed shape and metamorphoses’. Whereby the aforementioned ‘transitions’ of ideas, discourses, institutions and educational practices are never linear (Mehta, 2010, p. 105).

In relation to the developmental dynamics of comparative education, Mattei Dogan’s and Robert Phare’s considerations relating to the integrity of disciplines can be applied. They expose three ‘ideal types’ of researchers within a discipline: pioneer, builder, hybrid. A pioneer is a scientist, who creates a new problem field within the discipline. ‘This expansion moves into *terra incognita*, into an area about which science was ignorant’ (Dogan and Phare, 2019, p). The builder, on the other hand, continues the pioneer’s work. He or she develops the emerging problem field defined by the pioneers; brings it to maturity; conducts empirical research, develops theories, constructs methods, establishes new journals and associations. The latter often becomes the author of classic works. Finally, a hybrid researcher is one who crosses the boundaries of his or her discipline and enters territories which were previously the domain of another discipline. Sometimes he or she creates a scholarly ‘province’ out of fragments of two disciplines (Dogan and Phare, 2019, p. 172-173). The history and present state of comparative education provides an excellent exemplification of the above assumptions.

It has its scientific pioneers (for example, Marc Antoine Julian de Paris or Mathew Arnold) and its builders, who have given it full scientific validity (and are authors of canonical works – for example, Michael Sadler, Isaac Kandel, Nicholas Hans, George Bereday or Brian Holmes). Meanwhile, the INCREASING number of contemporary hybrid researchers constantly push the boundaries of comparative education in interactions with other (sub) disciplines.

The thesis of Mattei Dogan and Robert Phare is also quite accurate in relation to comparative education; they are convinced that when in a certain research field knowledge is already considerably accumulated then over time the field slowly starts to become drained (Dogan and Phare, 2019, p. 29). It begins to be characterised by ‘density’. There is even a talk of a ‘density paradox’, referring to ‘densely populated’ subdisciplines or problem fields, which by no means results in a greater accumulation of valuable knowledge, despite the increasing amount of research (Dogan and Phare, 2019, p. 32). Tony Becher and Paul Trowler also point out that disciplines experience ‘transient fashions’ for certain problem fields at different times; they become ‘hot’ and the number of researchers and publications addressing them increases (Becher and Trowler, 2001, p. 95). With the slow depletion of a problem field that is situated within the mainstream of research, innovations arise from research conducted on the margins (Dogan and Phare, 2019, p. 35).

Over the last decades and the entire twentieth century, these ‘densities’ and ‘depletions’ of problem fields in comparative education (and sometimes successive returns to the same problems in new contexts and configurations) have occurred very frequently. There is an evolution of the problem field of comparative education, depending on the changing educational and socio-cultural reality. At various stages in the development of comparative education, there was a different interest in the study of issues such as, for example, school reforms and the role of the state in this respect, the access of different social groups to various types of educational credentials, the relationship between education and globalisation processes or the role of technology in education. It is noticeable, for example, that there has been a decline in interest in illiteracy problems (due to the worldwide increase in the level of literacy) or in the issue of mandatory schooling (due to the significant standardisation of rules in this matter). One can also see the extraordinary responsiveness of comparative education to, for example, the impact of the Covid-19 pandemic on education and the increase role of distance learning. In this context, C. C. Wolhuter and L. Jacobs even referred to Covid-19 as a ‘potential catalyst’ for comparative education (Wolhuter and

Jacobs, 2021), there have also been mentions of 'post-pandemic prospects of scholarship' in comparative education (Oleksiyenko and co-authors, 2021).

Without a doubt, discussions on scientific status and potential are also part of a binary view of a scientific discipline – from the perspectives of essentialism and constructivism. Essentialists assume that the starting point for the creation of a discipline or subdiscipline is the cognitive factor, associated with the discovery of a specific problem field and then with detailed discoveries within it. This leads to the creation, and then, popularisation of the related knowledge (publications, teaching) (Hider and Coe, 2020, p. 11). Essentialists also believe that knowledge related to a problem field relevant to a (sub)discipline already exists before it is discovered. A discipline is thus created as a result of the human mind 'operating' within a particular field of knowledge, or a problem field, which was previously unrecognised. For example, the notion of the 'essence of mathematics' (Nis, 2014; Tymoczko, 1994), the 'essence of astronomy' (Putnam, 1914), or the 'essence of history' (Berlin, 1980, p. 172), or hundreds of the 'essence of philosophy' (Dilthey, 1954) appears repeatedly in the literature.

In contrast, the constructivist approach views disciplines as social constructs, formed as a result of the differentiation of knowledge, a process that has often been saturated with arbitrariness and power. Similarly, as with essentialism, the origin of new disciplines here is considered to be the result of the fragmentation and specialisation of knowledge and the emergence of new problem and knowledge fields (Woolgar, 1976, p. 270). However, the similarity ends there. Indeed, advocates of constructivism argue that the category 'discipline' does not have essential characteristics constituting the grounds for its creation (McCulloch, 2018, p. 91). Disciplines are not natural categories, instead, they are based on 'arbitrary classification' (Messer-Davidow, Shumway and Sylvan, 1993, p. 11).

I agree in this respect with the claim of Wolf Lepenies that the identity of disciplines cannot be defined by any 'ultimate meanings' derived from the category of 'science' (Lepenies 1998, p. 155). The division of disciplines within science is therefore not the result of some internal definitive logic of science, but is related to the 'power' of providing knowledge within a given scientific field by a relatively well-organised group of scientists who identify with it. Disciplines can thus be conceived as 'projects, in the sense of socially constituted authoritative purveyors of explanations and descriptions of segments of reality' (Carreira da Silva, 2016, p. 7), full of conflict and uncertainty. I believe that comparative education, with its dynamically changing problem field and shifting boundaries and its inherent uncertainty with

regard to its identity and self-identification, strongly affirms the validity of the constructivist approach.

Comparative education is interdisciplinary by nature. However, this interdisciplinary character is not unconditional, nor does it lead to the dispersion or elimination of the distinctiveness of the subdiscipline. The predominant approach among scholars, not only in the context of comparative education, is rather expressed – as neatly put by Marc De Mey – in the statement: ‘first disciplinarity before engaging in interdisciplinarity’ (Bechtel, 1986, p. 3). Thus, interdisciplinarity does not lead to the questioning of (sub) disciplines, but can lead to their enrichment, by introducing new research contexts (Mittelstraß, 2018, p. 17). Stephen Rowland expresses it in a similar manner: ‘interdisciplinary contestation [...] is not to merge or loosen disciplinary boundaries’ as much as it leads to a ‘clearer understanding of disciplinary difference’ and to the perception of disciplines as dynamic practices (Rowland, 2006, p. 81). Interdisciplinarity also becomes one of the sources of creative ‘disciplinary instability and dynamism’ (Wardle and Down, 2018, p. 115). Undoubtedly, the thesis put forward by Angelique Chettiparamb that interdisciplines could not exist without disciplines is also correct (Chettiparamb, 2007, p. 16). John A. Aldrich writes: ‘the term “interdisciplinary”, itself, requires a base of disciplines from which to consider acting across disciplines’ (Aldrich, 2014, p. 3). In this context, it can be argued that comparative education is not an interdiscipline, but is embedded in the broadly defined educational sciences, although individual researchers may refer to (and be ‘embedded’ in) the theories or assumptions of different social sciences or humanities. And this seems to be the line of thought followed by George Bereday and Martin Carnoy, who assume, as David A. Turner puts it, that a prerequisite for comparative education to be scholarly is for the comparatist to have ‘strong disciplinary background in one of the “contributing” disciplines’ (Turner, 2019, p. 14).

Nor can the term elevator or silo – which is applied to disciplines that focus towards ‘their interior’ (Jacobs, 2013, p. 17-18) be used in relation to comparative education. The notion of elevators or silos is clearly pejorative; they are seen as ‘remote, solitary and quiet places with high walls; their purpose is to provide isolation’ (Jacobs, 2013, p. 17-18). The basis for the silo mentality, in relation to scientific disciplines, is collective thinking, which creates a division between ‘us’ and ‘them’, with the ‘us’, clearly separated from another container. The silo is ‘obsessively dependent on its boundaries of separateness’ (Cilliers and Greyvenstein, 2012, p. 3). Quite often, within teams located in the silos, depreciation for those outside is observed. They

are considered unworthy of trust, lacking in competence and unable to either 'understand' or respond appropriately (Cilliers and Greyvenstein, 2012, p. 3). In relation to comparative education, which is open to the contributions from other sciences and 'constantly interactive', the term 'silo' is meaningless. It does not lock itself into a homogeneous orthodox way of thinking, it is oriented towards a permanent interdiscursive and interparadigmatic dialogue.

Logically, the notion of 'narcissism of small differences' (Brewer, 2013, p. 50-51) is irrelevant to comparative education as well (Brewer, 2013, p. 50-51). The source of this narcissism stems from deriving a "inward-looking" identity from small differences between ethnic groups, nation or (sub)disciplines; these differences are even perceived as a serious gap (Kolstø, 2007, p. 155-156). Similarly, Marjorie Garber exposes the notion of 'narcissism' leading to a 'sibling rivalry among disciplines' (Garber, 2001, p. 55). Representatives of a discipline, especially when these 'small differences' are exposed, frequently tend to take action defending their discipline from being 'diluted' through the creation of 'arbitrary or artificial disciplinary boundaries', as critically noted by Armin Krishnan, which evidently leads to reductionism (Krishnan, 2009, p. 4). In the case of comparative education, there is no place – let me reiterate – for any scientific narcissism or egocentrism. The phenomenon of a kind of uncertainty relating to its scientific identity is a source of constructive change in its framework and boundaries – in response to changes in educational and socio-cultural reality. Obsessive and neurotic closing in its otherness and distinctiveness is foreign to comparative education.

Despite the fact, as emphasised above, that comparative education is not an interdiscipline, it is of an inherently interdisciplinary nature. As Botho von Kopp writes: '(...) CE is in theory, research, and practise about "border crossing". Its paradigmatic plurality and its positioning between humanities, social sciences, education policy, and education practice, is constitutional'. Botho von Kopp believes that by 'maintaining a balance' between different approaches, comparative education can 'develop further into a unique and innovative "interdisciplinary discipline", and have a sustainable impact on education research and education' (Kopp, 2010, p. 17).

Perhaps it is more legitimate to use the term 'integration' in relation to pedagogy and comparative education. According to Julie Thompson Klein, it has more 'power' than interdisciplinarity, which is only concerned with 'combining of established categories, methods and perspectives' (Thompson, 1990, p. 26). This author, echoing the views of Richard Pring, writes that the concept of integration 'raises certain epistemological questions to which "interdisciplinarity" is indifferent. "Integration" incorporates the idea of

unity between forms of knowledge and their respective disciplines, whereas “interdisciplinarity” simply refers to the use of more than one discipline in pursuing a particular inquiry’ (Thompson, 1990, p. 27).

Is this openness of comparative education to new theories and approaches, highlighted above, of a ‘limitless’ nature? A partial answer to this question can be obtained by recalling the debate on its relation to postmodern way of thinking. Here, in 2005, Ervin H. Epstein and Catherine T. Carroll in their text ‘Abusing Ancestors. Historical Functionalism and the Postmodern Deviation in Comparative Education’ made a strong critique of attempts to define this pedagogy through the assumptions of postmodern thought. They concluded that postmodern discourses ‘abuse’ the history and classics of comparative education. They considered that although ‘in comparative education, the formative scholarship of Kandel and his contemporaries represents a relativism’, it acknowledged the existence of reality and did not, as postmodernists do, reduce it to various types of language games or mind representations. Ervin H. Epstein and Catherine T. Carroll have written, with criticism, that the postmodern approach rejects the possibility of any real cultural context (Epstein and Carroll, 2005, p. 69). Critics of postmodernism recognise, as Sonia Mehta and Peter Ninnes write, that ‘postmodernist theories contradict comparative education’s goals’; they are convinced that postmodernism and comparative education are mutually exclusive (Mehta and Ninnes, 2003, p. 244).

Attempts to ‘post-modernise’ comparative education have been unsuccessful, although arguably, the trend has made an impact on broadening the problem field of the subdiscipline; e.g. with issues of post-colonialism or a greater interest in the ‘pedagogy of difference’. Interestingly, an avid supporter of the integration of postmodern ideas into comparative education was Val D. Rust, who published the (often quoted and criticised) text ‘Postmodernism and its comparative education implications’ while he was chair of the ‘Comparative and International Education Society’. He claimed that postmodernism would make it possible to ‘define more clearly the met-anarratives’, which determine the shape of comparative education. Also it would dismantle them and replace with ‘small narratives’ (Larsen, 2009, p. 1045). Such an approach, as has already been reported, has not gained popularity, although in contrast, the post-structural theory of Michel Foucault is often used in comparative education. According to Marianne A. Larsen, this theory creates a ‘provocative’ context for comparative education, full of developmental potential, not specifically in the prescriptive aspect (‘what to do?’), but in the context of understanding the past and its relation to the

present (Larsen, 2009, p. 1056), I would add – especially in the context of socially constructed truth, knowledge and power. Thus, post-structuralist theory allows us to understand the historical and current shape of educational phenomena, practices and institutions – through analysing the phenomenon of the struggle for dominance between different ways of thinking about (the role of) education. The point here is to effectively impose a particular definition of ‘true knowledge’, by the government or a particular social group. This is tantamount to exercising power. Understanding the mechanisms of truth and knowledge construction to be instruments of power in shaping educational reality deepens the analytical and interpretive potential of comparative education. Whereas Simon Marginson and Marcela Mollis write that, from the perspective of the theory of Michel Foucault, ‘comparative education is an academic subdiscipline implicated in circuits of “power/knowledge”’ (Marginson and Mollis, 2010, p. 57).

### **Comparative educator as a traveller**

In the final part of my text, I would like to state that the heterogeneity (and unorthodox thinking), which characterises comparative education as a subdiscipline, should also apply to the way each individual comparativist thinks (and to his or her mindset). At the same time, he or she should be ready to interrupt his or her own ‘epistemological script’ - that is, to question own ways of perceiving, ordering, analysing and interpreting reality, which have so far often been considered irrevocable (Melosik, 1996, p. 47-56). Such interruptions can also occur through interactions with different ways of thinking and social practices. I wrote about this as follows: ‘Encountering the Other makes one’s knowledge and beliefs relative, undermines the faith in the sense of one’s own truths (...) There are then two options. One can close oneself in his or her metanarrative (close its doors and windows) and elevate it to the status of the Absolute Truth. One can exclude everything that is not compatible with it. On the other hand, one can accept the fragmentation of his or her own Story; then his or her identity and biography cease to be the Standard and the Norm for him or her. People discover themselves through collisions and amazements. They break through the “barrier of imagination” and reconstruct their own categories of perception of the world’ (Melosik, 2007, p. 389-390), becoming a different persons and, in the realm of science, a different scientists; a different comparative educators.

Moving through the different ‘versions of reality’, the comparative pedagogue is able to notice the richness and contradictions of meanings. This is what I wrote on this subject in an earlier text: ‘We can travel through

theories like continents. Each new theory can provide an excuse to relativise one's own assumptions. Similarly, the journey through different cultures and communities allows us to observe that what is seen as normal and natural in one place, as universal and metanarrative (as legitimised by religion, traditions or as the result of specific power relations), is elsewhere defined as particular. Such a journey teaches humility towards the world – it is too complex and internally contradictory, diffused and decentralised to be covered by a single theory. To wander through discourses and cultures, a holiday from one's own meanings; all this offers a unique chance to understand oneself and one's approach to the world, and gives hope that if “everything is different” (and yet comprehensible to us), then we do not need to search fiercely for “foundations” and “sources” (...). We can give up the stubborn derivation of the shape of the world and of life from however misunderstood “universals” (...) What for us constitutes the essence of our identity, biography and dreams or the axis of our theoretical narratives, for other people or in other theories may be of marginal significance’ (Melosik, 2007, p. 390). Once we understand this, it becomes easier for us to replace the typical question of the past, “what is the world like”, with a question of “which world is it” (Bauman, 1988, p. 41-42).

In doing so, the comparative education may take on the role of a ‘perpetual traveller’, who will continually travel across discourses and explore under which circumstances they may acquire the status of relevance. However, it is also possible to choose a ‘permanent’ residence – a theory which fascinates us with its possibilities and research potential (Melosik, 1995, p. 31). Nevertheless, we must not colonise the whole map with one's own approach, erase competing approaches, or create blank spaces. Here, we return to the origins of comparative education – the journey and the traveller. However, the traveller (comparativist) places his or her thinking and scientific identity within the theoretical and methodological rigours of contemporary science.

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## **Comparative and cross-cultural education in the context of cultural diversity**

**Abstract:** The aim of the article is to draw attention to the new challenges and tasks of the two sub-disciplines of education (comparative and cross-cultural education) in the face of widespread cultural diversity, growing nationalisms and the ongoing war in Ukraine. The author assumes that cultural diversity is the civilisational wealth of mankind, therefore these sub-disciplines are confronted with the challenge of conducting, in a conscious and responsible manner, the educational activities that provide knowledge about their own culture and other cultures and their representatives. The author presents numerous problems that these subdisciplines have to address, ranging from the awareness of the value of inherited culture to the need and necessity to transcend one's own ethnocentrism and sociocentrism. He poses numerous questions, refers to historical facts, points to the need for the emancipation of national memories, etc.

What is seen as the fundamental challenge for comparative and cross-cultural education is the one of liberating oneself from hyper-subordination and the ability to engage in a dialogue free from propaganda that intends to dominate the thinking and attitudes oriented towards cognition, understanding, cooperation, collaboration.

**Keywords:** comparative education, cross-cultural education, cultural diversity, identity, dialogue of cultures.

### **Introductory statements**

In the process of development, each sub-discipline expands its scope of analysis and research, undertakes new challenges, exchanges experiences with others, enriches and complements each other, and deepens its field of interest. The phenomenon of cultural diversity and the processes taking place in this context in the contemporary world highlight it more and more apparently in numerous scientific fields, disciplines and sub-disciplines, indicating the need to embark on new challenges, to define and implement new tasks. This is also true for comparative and cross-cultural education, which already in their very name seem to immanently contain the issue of cultural diversity and cultural difference. I would like to point out that racial, ethnic, religious, national, cultural pluralism does not exhaust the new diversity, the need for and possibility of reference and comparison. We are currently witnessing an unprecedented 'diversification of diversity', a multiplication of significant variables determining human needs, aspirations, plans and ambitions. The constantly expanding area of multiculturalism is the result of processes of movement of people on the globe, processes tied to economic and demographic problems, mobility, migration of various types, refugees, family reunification, cognitively, educationally, culturally and economically motivated peregrinations, natural cognitive curiosity about other cultures, the accession of new countries to the EU, etc. These processes and phenomena overlap with the problem of the classical understanding of multiculturalism (the dimension of ethnicity resident in a specific territory, in the area of contact and transitional borderlands, of centuries-old cultural diversity in a specific geographical area, etc.).

I believe that cultural diversity is the civilisational wealth of humanity, and therefore we are faced with the challenge of protecting this wealth, being responsible for it, and consciously undertaking educational activities in terms of providing knowledge about our own culture as well as other cultures and their representatives. Renata Nowakowska-Siuta (2014, p. 22) points out that 'Different cultures are at the same time the cause of crises and conflicts, hence the cross-cultural dialogue, verification of perceptions about other cultures, overcoming stereotypes are the most crucial challenges of comparative education in the 21st century'. She stresses that the preservation of national heritage is the responsibility of each country whilst benefiting from the experience of other countries, thus avoiding mistakes in the design of its own educational policy. I believe, therefore, that the awareness of cultural values, norms and patterns, the awareness of practices and experiences related to inherited and acquired values as the highest level of

psychological development, characteristic of human beings, is particularly important (Sztompka, 2002, p. 28-29).

I treat and perceive the awareness of the value of my own culture and other cultures, the possibility of references and comparisons, with regard to the above-mentioned sub-disciplines of education, in the axiological and teleological, but also epistemological context. I am convinced of the importance of the content of native culture as well as of different cultures, transmitted, perceived, assimilated and cultivated, of the ways in which they are utilised, of transgressing the limits of one's own culture or of closing oneself within the limits of a particular culture. I would also like to note the ontological aspect related to numerous issues of being and fulfilling oneself in the contemporary world, functioning in the face of multiple threats at the level of micro, meso- and macro-structures, orientation towards dialogue and conscious integration of cultures.

### **Comparative and cross-cultural education towards the issues of inherited and institutionally shaped identities**

The awareness of living in a multicultural world, starting from the local scale and up to the global one, raises numerous problems related to individual identity, as well as identity of nations, countries and their cultures (Nikitorowicz, 2022, p. 21-38). The power of being Different in terms of culture is a tragedy and joy that intensifies the need to formulate currently important existential questions that are of interest to comparative and cross-cultural education, including those formulated by Barbara Skarga (2009, p. 384).

‘... is it possible to negate this experience of the self, the desire to perpetuate one's own separateness and “I”, or the experience of loneliness in which the I so acutely reveals itself to the self?...’ Can one negate the experience of the self when it is awakened by guilt and shame? Finally, is it possible to negate the meaning of this persistent search for oneself?

Hence, a particularly important task of comparative education and cross-cultural education in a multipolar world is to support the awareness of inherited values, norms and patterns of the native culture, which should be the base, the foundation on which further elements of identity can be built. A person naturally ‘immersed’ in his or her native culture inherits unconsciously, but it is this heritage, its content, the forms and strength of its transmission, the methods of influence, the conditions and circumstances in which such transmission takes place, that determine in the future the

meaning of this content in new conditions, situations, contexts. It is indisputable that we inherit elements of culture such as language, belief, religion, spatial location, lifestyle, traditions, customs, habits, rituals, the history and lot of our family, etc. Can any of these, in the context of Skarga's indications, evoke feelings of guilt and shame?

Most certainly yes, especially when there is a narrative imposed from the highest level related to state policy, institutional educational policy, media policy, national or supranational policy. The ongoing war in Ukraine makes us realise on a daily basis how much can change in the thinking, attitudes, reactions and behaviour towards each other, how much can change in relations between nations, in Europe and in the world.

From years of my research experience in the borderlands of north-eastern Poland it is clear that a new education policy is needed in this regard, a policy leading to the acquisition of awareness of the value of inherited culture by every citizen. In a situation of guilt or shame, it is necessary to 'work through' such states responsibly. Yuval Noah Harari (2018) points out that the greatest contemporary challenge is to teach children not to feel disempowered, confined within conventions. They need to be taught to respond and represent their respective conditions, to be able to think with the future in mind, to shape the conditions for solving the problems of global human civilisation (crisis of democracy, wars, terrorism, global warming, access to water, clean air, pollution of the world, etc.).

It is the duty of every sub-discipline of education, especially of comparative and cross-cultural education, to learn from various events in human history. For example, from one that lasted for two centuries in Canada. Settlers from Europe carried out deliberate destructive actions against the culture of the First Nations. Canada, now proud of its multi-ethnicity, used to fund boarding schools run mainly by the Catholic Church for indigenous children. They persecuted all that belonged to these cultures, 'knocked out' of the children's heads their native language. The children were stripped off of their identity by being assigned numbers, not allowed to use their names, humiliated, beaten with a belt, whipped, molested, punished with an electric chair, sexually abused, etc. It was not until two centuries later, when it was finally understood that the rhythm of life of the First Nations disrupted by the settlers' proposition of a different work ethic and raising children away from their families failed, and that assimilation activities introduced by violence were counterproductive.

What was the reason for destroying indigenous values which should have been protected and on the foundation of which identity could have been

shaped? Why impose values destroying the cultural heritage of their ancestors? Where did such a barbaric idea come from to take children away from the indigenous people and shape them according to the European fashion? 'The government decided to launch social engineering to raise generations of farmers and lumberjacks and obedient wives' (Gierak-Onoszko, 2019, p. 86). The settlers came to multiply their wealth, they did not understand the people living according to the cycle of nature. Everything was destroyed: childhood, family, bonds, community, work ethos, etc. The inherited trauma of the students-survivors of those schools did not allow them to regain their sense of worth and dignity. They were deprived of everything of value which had been handed down from generation to generation in that culture and tradition, with inhuman punishments for using the native language, cultivating customs, habits, garments, songs, dances, beliefs, rituals, ways of being and living. Evidence of this includes the following statements: 'I was still afraid of what they would do to me again. After that, we waited all our lives for where the blow would come from. All my life on all fours, hunched over. School has passed, but the hunching did not' (Gierak-Onoszko, 2019, p. 22). 'He used to beat me and say that he was inflicting punishment on me for my sins in the name of Jesus Christ our Lord, amen!' (Gierak-Onoszko, 2019, p. 68). 'This pain spills over to the next generation, our children have inherited it. They no longer have the strength to bear their fate. We are here on behalf of the children who have killed themselves. The death of each child weakens our community. We are like a bird that loses its feathers: they fall silently, but in the end the bird is no longer able to move and perishes.' (Gierak-Onoszko, 2019, p. 91)

In the context of the above, we should ask: are we not currently dealing with the aforementioned phenomenon in the Russian society, which, driven by the idea of supremacy, fails to recognise Ukraine's right to self-determination, undermines and does not recognise the Ukrainian language, the rich history of this nation, the traditions inscribed in the history and memory of Ukrainians, their values and heroes who fought for a free and independent Ukraine? Similarly, children from Ukraine are being sent to Russia with the intention to assimilate them, told that they are being rescued from the Nazis and Ukrainian nationalists.

### **Comparative and cross-cultural education in the face of cross-cultural and transcultural shaping of identity**

Comparative and cross-cultural education should show the different possibilities of working in a multicultural environment in order to lead to the acquisition of the ability to transcend one's own ethnocentrism and sociocentrism, to understand and communicate with the Others. Meanwhile, the governments of numerous countries have abandoned the education in this area mainly to non-governmental organisations, concentrating on saving the economic, banking and military system, without noticing the disappearance of civic attitudes and the collapse of faith in democracy, in the sense of European and global solidarity, in the common good which creates dialogue and world peace. After all, as Alicja Szerłağ (2011, p. 7) emphasised '...Diversity is not just a temporary discomfort, a temporary hassle, but something permanent, something immutable that will always be'.

In the context of the above, the aforementioned sub-disciplines of education should focus on the organisation of conditions and situations supporting the fulfilment of the existential value of the three cultures creating the identity of a human being (the inherited culture of the family home and the local community, the culture acquired in state educational institutions and the individually shaped culture, i.e. the culture of needs, aspirations, aims and plans). I relate this issue to the principle of the order of the world, its existence and the continuity of a culture which shapes and liberates humans from subordination within it. Related to it is the task of meeting the need for internal and external dialogue in order to integrate these cultures in the process of human development and the groups with which we identify in the continuous process of forming individual and socio-cultural identities (Nikitorowicz, 2000, 2005, 2020).

I believe that what the multicultural Europe and the world need nowadays, is to have a tolerance for many cultures within one person, a tolerance for the new human characterised by a dynamic intercultural and transcultural identity, an individual who represents and respects many cultures in himself or herself at the same time. In one's development, the benefits from what is offered by other cultures, drawing on and borrowing from them, symmetrical exchange promotes the formation of a cross-cultural identity. 'Not cultivating the "in-between" area allows for instrumental treatment of the issue of culture (and cultures), ignorance and a return to worn-out, "out-of-date" and therefore harmful categories' (Czajka, 2012, p.13). As a result of many years of research at the Department of Cross-Cultural Education at the University in Białystok, I notice and point out the need to create

a transcultural human being who abandons a single view of the world with permanent cultural divisions.

**Comparative and cross-cultural education towards the emancipation of national memories, elimination of prejudices and negative stereotypes**

Comparative and cross-cultural education cannot refrain from an honest evaluation of the past, from displaying the experiences of one side and the other, from realising the importance of memory as a source of mature human reflection. Krzesimir Dębski (2016), in his search for his grandfather's grave in Kisielin in Volhynia, notes that he was met with a great silence. His grandfather, being a doctor, saved many lives, and the town was populated by Ukrainians, Poles, Russians, Czechs, Jews and Germans. The UPA soldiers had also benefited from his services. He was murdered by people driven by nationalist madness. He writes about the pincers of nationalism, communism and Nazism, about the fact that we must face the truth, work through the trauma of ethnic cleansing to allow new generations to build a national identity and pride, exonerated from the guilt of their ancestors, liberated from hostility, contempt, hatred.

Therefore, it is necessary to go back in history and show facts, statements by well-known authorities, and also to take action to eliminate the aggressive propaganda in People's Poland, the negative stereotypes formed over the years, for example, of the soldiers of the Ukrainian Insurgent Army (UPA) as bandits and 'rezunsi' [rezun - pl. for 'Ukrainian bandit, murderer'; translator's note]. It is our duty to present authentic accounts, experiences and experiences symmetrically. For example, the memoirs of a soldier of the UPA, Omelan Pleczeń (1991), who hid from 1947 to 1956 (nine years) in bunkers and forests in the region of Przemyśl, Sanok and Lesko. His confessions allow us to look at and interpret the problem of the Polish-Ukrainian conflict in 1945-1947 in a different way, and enable us to free ourselves from the 'black hatred' shaped in the People's Republic of Poland by the repeatedly published book 'Łuny w Bieszczadach' [pl. Fires Glowing in Bieszczady]. The ancestors of this soldier had lived in this area for centuries and were exiled, which deprived them of the opportunity to return to their native lands. Mirosława Kawecka, who translated the book from Ukrainian, wrote: '...this book will not contribute to the flare-up of emotions and eternal discussions - 'who is at fault', but it will help to look at the Ukrainian side of the conflict as normal people who loved, hated and died for their motherland, and that it will contribute to filling this huge gap of alienation and resentment that

has been created between our nations in the course of the post-war years' (Płeczeń, 1991, p. 6).

I believe that the objective of these sub-disciplines of education is precisely to focus on the emancipation of national memories. Each country has the right to have its own vision of the past and to pursue a specific historical policy, however, it is essential to connect with the past, which is an important element in shaping the consciousness of citizens. In presenting our history, our identity and our national pride, we should face the facts. It is not relevant whether they are convenient for us, for our national identity. What is relevant is to not be indifferent towards them, to refrain from falsifying images from history, refrain from repeating past mistakes. On the territory of today's Ukraine, nowadays live the heirs of the Polish-Lithuanian Commonwealth who are aware of their heritage, just as Polish citizens identify with their Ukrainian heritage in Poland. Teresa Siedlak-Kołyżsko (2006) writes that they have survived and should be supported in preserving the memory of their ancestors, who settled in these lands centuries ago and feel at home. In one village, not far from Zhytomyr, residents emphasised: 'We have always been here, ma'am. My father and mother were born here, our grandparents and our ancestors were from this village, because this is where the Poles lived, this is where Poland supposedly was a long time ago. But we don't know it well, because we were afraid to talk about it, we were not allowed to...' (Siedlak-Kołyżsko, 2006, p. 19). Nowadays, there are opportunities and efforts to present significant characters from these regions, which are the common heritage of Poland and Ukraine. In Kalnik, where Jarosław Iwaszkiewicz was born, a school was named after him, a small museum has been set up, and a monument of the author of the 'Fame and Glory' is located in front of the school. When analysing the biography of Karol Szymanowski, regarded as the greatest composer after Chopin, one cannot fail to notice his double Polish-Ukrainian identity (Waldorff, 1992). He was born in Tymoszówka in 1882 on the border between Ukraine and Podolia. Juliusz Słowacki, Ignacy Jan Paderewski and Jarosław Iwaszkiewicz were also connected with these lands. Karol's mother, Anna, was descended from the Taube barons, who came to the 'borderlands' [pl. Kresy; traditional name for the Eastern territories lost by Poland over the centuries; translator's note] from Livonia. The family included polonised Germans - the Blumenfelds, the Neuhauses. Gustav Neuhaus had a music school in nearby Elizavetgrad (Kirovograd), which Karol attended, and there were also Russian estates in the area.

I believe that we are ready to display our historical wisdom in order to seek agreement in the search for and representation of our shared heritage

with the Ukrainians, having a common history and cultural heritage shaped together over many centuries. The evidence thereof, among other things, is exemplified by the monument to Ukrainians and Poles, who died in July 1648 in the Battle of Machnówka. After all, on this land there lived, worked and created a common culture and history people who often had a dual sense of identity. They did not disappear, despite deportations, persecution and displacement. Their descendants still live, they point to their experiences, to the brotherhood of Poles and Ukrainians, and they now openly and without fear declare that they are of Polish origin, which once they were afraid to admit, and currently more and more people are admitting they are Ukrainians of Polish origin. The 'positive memory' and indications of the following sort are also revealed more frequently: '...even during the war, when there were Bandera's men, someone of other nationality would always warn us and save us. Similarly, during deportations to Siberia, of Poles especially, our neighbours always warned us. They supported one another' (Siedlak-Kołyшко, 2006, p. 406). 'A lot has changed for the better. We can talk freely. At Christmas we don't have to lock our doors and cover our windows to prevent someone peeping in that we are celebrating Christmas, that there is, God forbid, a Christmas tree. We can sing carols and, most importantly, talk in Polish' (Siedlak-Kołyшко, 2006, p. 410).

### **Comparative and cross-cultural education in creating a paradigm for the coexistence of diverse cultures**

In the context of the above, I would like to draw attention to a particular challenge of comparative and cross-cultural education related to engaging in a dialogue free from propaganda, which misappropriates the thinking and attitudes oriented towards cognition, understanding, cooperation, collaboration. The challenge is to work towards eradicating the culture of cynicism, manipulation, exploitation of the trust of others, of their natural, selfless kindness, not allowing a culture of indifference, self-interest and egoism to emerge. It can be described as the challenge of bearing witness to heterologous thinking, responsibility for the Other, learning about the Other. A person perceiving and interpreting the world in a heterological manner is able to combine his or her national, state, European and civilisational citizenship and patriotism, to perceive cosmopolitanism as the idea of equal kindness towards small homelands. Is capable of giving up efforts to 'establish himself or herself' in the world, motivated by lack of reflection, egoism, actions which are temporarily pragmatic. Such a person is also able,

and I find this particularly relevant today, not to give in to obedience and super-obedience, but to represent civil disobedience (Gros, 2019).

Frederic Gros draws attention to obedience - since disobedience, in the face of the absurdity and irrationality of the world, is a given. Why do we obey, in what ways are we obedient, subservient, compliant, conformist, giving up the right to resist, not listening to the voice of conscience? He approaches the issue of voluntary obedience as a recognition of superiority, for example of the Creator, which may presuppose, as a result of this acceptance and recognition of superiority, freedom and activity. The particular problem, however, is the one of absolute obedience; unconditional, automatic, characterised by the desire to serve, linked to the worship of the leader, admiration, enchantment, fascination, etc. This is what allows the latter to hold on to power. Thus, Gros wonders how to develop the ability not to uphold the power, not to give the benefit of the doubt, not to give more than is demanded or expected, how not to be hyper-obedient but reflective, thoughtful, willing to be free and responsible for the tasks entrusted to us within the context of our own conscience.

The leading issue becomes the dialogue focused on breaking down barriers, fears, prejudices and stereotypes in a spirit of creative encounter rather than indifference or hostility. On 27th of January, 2020, during the commemoration of the 74th anniversary of the Auschwitz liberation, Marian Turski, a former prisoner of the camp, called for not being indifferent to historical lies, to stretching the historic facts for the sake of current politics. He was a teenager when the war broke out. His mother came from the Polish-Lithuanian-Belarusian borderland, where marching armies were constantly robbing, burning and raping. He drew attention to the phrase 'Auschwitz did not fall from the sky' and took the audience back to 1930s Berlin, pointing out the prohibitions and orders that would appear. Among others: 'Jews are not allowed to sit on these benches', 'Jews are forbidden to enter this swimming pool', 'Jews are not allowed to be members of German singing associations'. This continued to happen, slowly, until the orders and injunctions: 'Jewish, non-Aryan children are not allowed to play with German, Aryan children', 'We sell bread and food products to Jews only after 5pm'. The problem was making people accustomed - victims and oppressors and everyone else - that it was possible to exclude someone, to stigmatise them, to push this minority out of the society. He pointed out that the authorities, seeing how people slowly give in to callousness, stop reacting to evil and allow themselves to accelerate the process (banning emigration, prohibition on employment and finally sending people to ghettos). He stressed that what

had happened then could happen anywhere, and what we should defend are minority rights and the democratic order. He concluded by pointing out the need to abide by the commandment: 'Don't be indifferent. Otherwise, you won't even notice when "some Auschwitz" suddenly falls from the sky on you or on your descendants.'

## **Conclusion**

I have highlighted the problems which both the comparative and the cross-cultural education should notice and address in contemporary conditions of cultural diversity. I associate them with the responsibility of these sub-disciplines, which stems from the basic assumptions of anthropology, its principles and values indicating the ability to see oneself in the context of others, to imagine oneself and to situate oneself in the circumstances of others. The result is orientation towards dialogue, bonds and the sense of community, responsibility for the development of the human species and the peaceful resolution of conflicts. Being in relationship with others involves symbolic interactionism, constructivism, hermeneutic thought and understanding sociology. Taking, for instance, understanding and comprehension, particularly relevant to hermeneutics in my view, which is achieved through thought, reflection, negotiation, dialogue, which conditions a dignified human existence in the world (Gadamer, 2004, p. 413). This allows us to address the problems of creative communal identity, attitudes formed in this regard, of facing and resolving dilemmas of attitude in terms of representing one's own culture with dignity without demeaning others, of carrying out educational activities in this regard at the same time, responsibility for what has been ingrained in us and for the universal values of our human civilisation (Harari, 2018). This category of responsibility, as Józef Górniewicz (1997) points out, belonged to the basic canon of good human upbringing. Katarzyna Segiet (2022, p. 205) noted that nowadays responsibility is in particular demand not only in everyday life situations, but for the global world in which we exist. 'Life creates both opportunities for us to find the right offer of activity and certain threats to the current functioning of individuals, groups and communities, as well as to the projections and plans they build for the future.'

In today's world, in the conditions of liberal democracy and multicultural societies taking shape and, at the same time, numerous dangers present in this world, the problem of continuous internal (hermeneutic) dialogue seems to be the leading issue: creative activity, motivation for dialogue, continuing education, responsibility for human development and the preservation of world peace. As Stefan M. Kwiatkowski (2008, p. 7) wrote

in the introduction to his work on continuing education, 'Education and citizenship turn our attention to an upbringing society, that is, a society in which we observe the phenomenon of the overlap of education, work, social activity, politics and economics'. In this context, Irena Wojnar (2000, p. 110) calls for attention to the formation of a culture of peace, describing this challenge as one of the most important educational commitments for the 21st century. 'This issue grows to symbolic dimensions and deserves our close attention, for we have long since overcome the superficial slogans of a politicised 'struggle for peace' and are instead looking for educational ways to, in the words of C.K. Norwid, 'make peace'. Therefore, a culture of peace can be accepted as a fundamental determinant of the ethos of education in the upcoming century..'

In the context of the above, further enquiries and reflections arise regarding, for instance, the culture of patriotism, which also lie within the field of interest of the analysed sub-disciplines. Szewach Weiss (2018, p. 185) noted: 'I almost never use the word 'patriot'. I am neither a Polish nor a Jewish patriot. There has been too much patriotism in my life. It is difficult to separate it from nationalism when you pump up the balloon of patriotism. There is a nation with its religion, but there are other nations with theirs. This is connected with a certain egocentrism, personal and national egoism, with artificial pride'. I believe that it is the duty of the sub-discipline of comparative and cross-cultural education to take up the previously stated problems, as well as to try to answer the questions formulated above, especially those regarding internal and external dialogue, contemplation, reflection on the need to create mediating attitudes, eliminating prejudices and stereotypes, fears of others, suspecting others of being enemies, conspirators and a threat. Perhaps we should refer more often to Plato's 'art of intelligent conversation' or Heidegger's 'enquiry' about value and meaning, to think in a personalist and interactionist context.

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## **Problems of conducting comparative research in education**

**Abstract:** The author critically analyses the persistence in comparative pedagogy of such approach to conducting interdisciplinary and transdisciplinary research, inadequate to the state of integration of the sciences worldwide, and perpetuating the atomisation of the humanities and social sciences characteristic of the 20th century. As such, the author explains the reasons for comparative education to become more open in exploring education in its broader political, cultural, religious, legal and economic context. The discipline necessarily needs to consider the comparative nature of ideas, paradigms, theories, concepts or philosophies of education, to refine its diagnostic tools with respect to differences in the aforementioned contexts, and to refine theory maps and methods of comparative research thus minimising errors in comparison of what is, nonetheless, incomparable.

**Keywords:** comparativism, education, education systems, school reform strategies, education policy.

### **Introduction**

The analysis addresses methodological dilemmas of comparative research in social sciences as significant for educational comparativists. For over a century, not only Polish comparativism has been interested in education across different countries, cultures, political systems, etc. Unfortunately, a 'discipline-based thinking syndrome' (Węsierski, 2011, p. 113) still prevails, characterised by obstinate adherence to institutional and organisational divisions and atomisation of the social and human sciences and their preservation, adequately including the sub-disciplines of the sciences developed

within them. In the 21st century, the sciences fail to develop in accordance with their own specific object of study, their own methods and concepts, as they remain inseparable, despite the tendency, characteristic of the 20th century, for the sciences to become, supposedly, autonomous. Education, similarly to numerous other areas of public life and its management by state or local government or other sovereign social entities, is not an object of study for pedagogy exclusively, and international politics, with respect to this already atomised process, has lost its privilege years ago to separately address the comparative study of various problems of education in the countries selected by researchers.

Michał R. Węsierski aptly wrote: ‘The condition of the separation between research areas is permanently disregarded and it is thus difficult to assess how each discipline could be assigned only its respective research object. The different classes of phenomena studied by anthropologists or sociologists are not inseparable from the classes of phenomena studied by ethnographers or historians’ (ibid.). One might therefore pose a question per analogiam as to what would e.g. be the substantial difference between comparative education and political sociology, international studies or public policy, since each of these academic disciplines studies precisely the same aspects of differences and similarities in education policies around the world. Therefore, the maintenance of the supposed distinctiveness of the research object of comparative education, which is no longer adequate to globalisation and transdisciplinary movements of scientific knowledge, has no reason to be upheld any further. ‘In the social sciences, as in the natural sciences, a partial overlap exists between the material scope (research area) of individual disciplines and the material fields (empirical systems) of co-extensional claims and correspondingly – empirical theories. In this instance, formulation of strict methodological directives with regard to determination of the research object of scientific disciplines becomes obsolete. There is value in addressing disciplines, to factor in their role in teaching as well as in organisation and institutionalisation of research, however, not when the function of science is in question. Theoretical knowledge serves to demonstrate similarities and relationships between phenomena, rather than to create barriers between subject ‘ (ibid., p. 114).

### **The specific nature of comparativist research**

Indeed, comparativists conduct educational research in the world of global movement of information, data, access to educational reports or scientific literature related to current social thought. The tendency towards

the international institutionalisation and commercialisation of educational diagnosis is becoming increasingly apparent, with the aim to incorporate comparativism into the stock of tools which are also useful for various purposes from the perspective of business and political authorities. This type of diagnosis concerns the public policies in the countries of interest to the researcher, which are also diverse. The most precise and, consequently, least debatable scope and opportunity for such research is geographical, territorial comparison. The problems, however, begin to emerge with contrasting value systems, cultures, religions, laws, etc. being involved. With open access to a wide range of research data, comparative research develops in several directions:

1. within the framework of international agreements and joint research programmes which are co-financed by member state governments, e.g. OECD surveys – PISA, TIMSS, PIRLS, etc. (Dolata, Jakubowski and Pokropek, 2013; Piotrowski, 2006);
2. within the framework of international research projects which are funded by global corporations, non-governmental international organisations, supranational organisations, e.g. the Batory Foundation, the Soros Foundation, etc.
3. within the framework of interuniversity research projects, which are funded through national and international competitions, e.g. competitions of national research agencies, e.g. the National Science Centre and the National Centre for Research and Development (Gmerek; Melosik; Potulicka, 1993, 1996, 2014, 2017, 2019; Slowinska, 2007);
4. on the basis of individual or team initiatives of scientists within the scope of academic doctoral schools or the implementation of individual research tasks as part of scientific progression, e.g. to obtain habilitation or professorship (Kupisiewicz, 1995; Melosik, 1993, 1995, 2007; Murzyn and Śliwerski, 2020; Nowakowska-Siuta, 2002, 2005, 2007, 2014; Nowosad and Tomasik-Abdelsamie, 2020; Nowosad, 2022; Okoń 1997; Pachociński, 1999, 2004, 2007; Piowarski, 2006; Wojniak 2019).

Comparativists also draw from conventional generators of data produced by state institutions, such as the annual and thematic reports of ministries, statistical offices or state archives. ‘The comparative approach competes with the study of individual cases, whereas – contrary to the views expressed from time to time – it is not an alternative to the **statistical approach**. Quite the opposite, comparative analysis more often resorts to statistical methods,

which is all the more advantageous since in causal analysis variables are selected more sparingly than in other comparisons' (von Beyme, 2005, p. 149). Some consider the initiatives of publicists, journalists, reporters, whose time abroad admittedly stimulates interest in foreignness, in diversity, although the nature of their analyses and narratives is superficial. However, they undoubtedly inspire researchers to generate new research projects or even to verify their own interpretations of the obtained data. Essential to comparative research is the selection of variables which allows for a reductive approach to possibly capture the essence of their international correlations. 'Those who reach for the statistical method are no less concerned with comprehensiveness than comparativists, who proceed in a descriptive and typological way and thus, every now and then, attempts to reduce the complexity of the comparative material are made through the introduction of super variables, the number of which in some cases is scaled down to seven' (von Beyme, 2005, p. 150).

Comparative education research is primarily concerned with the differences and similarities in the public policies of various countries, however there appear discrepancies between them due to the type of research, namely whether the latter is academic, scientific or perhaps oriented towards public policy. While the aim of comparative academic research is to find out the truth of a given public sphere, to gain a better understanding of it, in the case of comparative research in policy research and policy analysis, their aim is to change, to reform a specific area of public life (transport, health, education, culture, security, etc.). Arnošt Veselý (2007), therefore, includes in two research approaches of educational policies not only the difference in their main objectives, but also who their client is, how they are conducted, what is analysed, how the data collection takes place and what is the final product of such research (Table 1). By public policy, this author refers to '(...) the practice and theory of public policy in the sense of policy (public sphere). Policy studies comprise research activity, which is primarily directed towards the theoretical understanding of the policy-making process, and thus towards the management of the public sphere (policy). The analysis of the public sphere (policy analysis) is a practical activity aimed primarily at shaping the knowledge and methodologies used in the formation of real policy, and thus is oriented towards knowledge about the public sphere. The third focal point of this research is policy evaluation, understood as activity directed at valuing the effects and consequences of implemented policies' (ibid., p. 23).

**Table 1.** Differences between academic research and public policy-oriented research

	Academic research	Policy research and policy analysis
main goal	understanding, establishing the truth	change
client	unspecified, truth, public interest	specific customer, policy actor (continuous communication necessary)
method	explanation	valorisation
subject of the analysis	field, discipline (e.g. transport system, etc.)	problem (e.g. overloading of public transport)
data collection	extensive phase of primary data collection	often only a secondary analysis of the data
end product	study, scientific or specialised article	analysis, plan, memorandum

Source: Veselý, 2007, p. 27.

Therefore, it is necessary to reconstruct contemporary comparative knowledge for comparative education thus providing its representatives with an opportunity to conduct international inter- and transdisciplinary research on different dimensions of the function of education in the world and the obtained diagnostic results will allow for a more comprehensive, deeper description, reconstruction, analysis and explication of the data. The approach should include scientific disciplines in Poland such as, for example: sociology (sociology of education, sociology of politics, sociology of culture, sociology of religion, macrosociology), anthropology (cultural anthropology, philosophical anthropology), public policy (social policy), psychology (psychology of education, psychology of learning, intercultural psychology, social psychology), political sciences (geopolitics), international relations, research methodology (humanities, social sciences, natural sciences), legal sciences (educational law), economic sciences (macroeconomics), management and quality sciences, architecture (school architecture), art sciences (school design), etc. I do not elaborate on this issue at this point, as it requires a separate study. Instead, I indicate the necessity to compare inter- and transdisciplinary education. Educational policy is no longer the domain, let alone the exclusivity, of pedagogy as a science, as changes in the public policies of democratic states have marginalised scientific discourse allowing the governments to pursue their own public policies, among which

one sphere is education (Kloczowski, ed., 2021; Kurowska, 2011; Wołek, ed., 2021).

### **Comparativism of ideas, paradigms, theories, educational concepts**

Contemporary comparativists are particularly interested in quantitative studies, however, in order for them to be used in the practice of governance in the public sphere, such studies should account for the context of the political system, the legal system (the dominant doctrine in such countries), the ideologies, theories and paradigms of social thought evolving or preserving their status quo in the governance of the state and this sphere. The 'geography' of social paradigms and theories, including educational ones, which constitute the overt and/or covert agenda of the political formation in power (a monist one or an ideologically heterogeneous coalition), may not be irrelevant for comparative research. The currents, concepts, ideological orientations moving to the centre '(...)' are of the greatest importance for the Polish philosophy of theoretical foundations of education and pedagogy and the foundations of thinking about educational policy in the period of cultural breakthrough, as they directly address questions about education in a period of great changes and challenges' (Kwieciński, Witkowski, 1993, p. 5).

The shift in geopolitics probably also affects educational reforms in countries of different political, economic and even military communities. Polish education has also been included in comparative studies of the OECD, EU and NATO countries, at the same time providing citizens and politicians with access to scientific debates around ideological spheres, rather than merely to the measurement of school achievement or the efficiency of each state in solving the social problems of its citizens and their children. Theories of social sciences are not developed for a temporarily ruling political formation, as they are rooted in the history of thought in times of orthodoxy, heterodoxy, as well as heterogeneity, while educators reach for such a theory to either conform to or contest political correctness, or use theories or ideas which support their professional independence from political power. Thus, research activities of some are aimed at confirming the alleged legitimacy of existing educational policies, while others are interested in the scientific credibility of the studied processes, the changes taking place in education, regardless of whether it pleases the authorities.

Of significant value to contemporary comparativism is also the reconstruction of educational reforms in selected countries of the world, which Polish comparativists have conducted from the perspective of their chosen ideology and school reform strategy (Chłodna, 2008; Gmerek, 2005, 2007,

2011, 2017; Melosik, 1993, 1995, 2007; Potulicka, 1993, 1996, 2014, 2017, 2019; Suwalska, 2018; Nowakowska-Siuta, 2002, 2005, 2007, 2014, 2021; Nowosad, 2022; Murzyn and Śliwerski, 2020) or philosophies of education leading in other countries (Godoń, 2012; Kohlberg, Mayer, 1993; Melosik, 1993; Szkudlarek, 1993, 2017; Szkudlarek and Śliwerski, 1991; Witkowski, 1993). The development of this field of comparativism is essential insofar as it allows to avoid the subordination of national discourses and theories to the dominance of American approaches, which almost completely neglect the participation of scholars from European countries, especially post-socialist ones, even though educational philosophies or theories emerge in an increasingly visible manner and are remarkably similar to each other. Klaus von Beyme writes about the dominant tradition of thought in the social sciences back in the 1980s which were subjected to the typology of thinking styles developed by the Norwegian sociologist, Johan Galtung. In the light of these analyses, a Gallican style based on linguistics and the arts was developing in comparative science in France, a Teutonic style combining Marxism with a systemic theory of the control of social change was dominant in Eastern European countries, and a theoretical style, following the tradition of Anglo-American pragmatism with a clear liberation of science from the influence of political ideology on the public sphere, prevailed in Britain.

‘Comparative studies of political science in the US and Europe suggest that globalisation of this discipline has not yet progressed to a great extent, notwithstanding the dominance of US theories and methods. In many European countries – apart from the UK – political scientists have easier access to institutions of power and the media. They still prefer – like Canadians, for example – to publish in European journals. There is also a different distribution of tendencies with regard to theory construction. Americans continue to emphasise the individual first and foremost, while the approaches of Europeans are more diverse, with political science reflecting the state of political systems, which are a mixture of liberalism, corporatism, consensual democracy, elitism, populism, statism and socialism’ (von Beyme, 2005, p. 26).

At the beginning of the transformational breakthrough in Poland, Zbigniew Kwiecieński emphasised the necessity of restoring courage and seriousness to education with regard to undertaking research problems, comparative ones as well, interrupting the mimetic games, especially characteristic of scientists in a totalitarian state, which boiled down to ‘(...) the shaping of minds, worldviews and competences appropriate for the tasks of education and upbringing defined outside of it (education – added by the

author), externally' (Kwieciński, 1993, p. 7). While three decades ago, one could complain about the lack of recognition by a large part of scientists of the multiplicity of educational theories in the world of developed democracies and social sciences, now, at the end of the first quarter of 21st century, Polish education has already experienced the state of knowledge deficit, limitations, unawareness in this regard, but has become involved in the joint creation of paradigm and theory maps, which also enrich the state of global knowledge with Polish sources of thought, its diverse currents (Śliwerski, 1998, 2009; Witkowski, 1998; Wołoszyn, 1998).

Polish comparative education has managed, in the span of over three decades, to catch up, as well as expand its knowledge of the state, scope and typology of maps of contemporary educational theories in the world and their related critical meta-discourses. The globalisation of the 21st century has fostered an acceleration and internationalisation of research evidence in this area, and thus it is considerably harder for authorities to manipulate data from comparative empirical studies concerning the state of educational reforms in different countries, their determinants, the applied strategies and outcomes. One indisputable point is that in the realm of ideas and theories it is impossible to claim they are comparable.

The need for comparative research should concern every scientific discipline – as literary scholars emphasise the importance of such research, not only for Polish science – to enable (...) the search for tools for understanding the multilingual and multicultural world, experiencing a period of real flourish in Poland along with Central and Eastern Europe, as a result of the growing interest in translation, cultural phenomena of contact, interference and hybridisation connected with the global movement of people and symbolic capital. Nowadays, these movements have an unprecedented impact on the functioning of individuals and communities of all kinds, raising questions about the mechanisms of identity identification, domestication and alienation, which are also accompanied, to some extent, by various forms of institutional consolidation of comparativism (...). Undoubtedly, it is worth seeing them in the perspective of the powerful socio-political transformations, which have emerged in the entire region subjected to decades of communist ideology, whose influence restricted the freedom necessary for all kinds of comparatist endeavours, excluding even the domestic academy from those intellectual and existential opportunities available to the world behind the Iron Curtain' (Bilczewski and Hejmej, 2022, p. 13).

The participation of Polish comparativists in international research projects brings multifaceted benefits, as it contributes to accelerate the

liberation of Polish educational thought from constraints, its marginalisation, undervaluation or isolation, which, as a result of censorship, deprived them of access to the foreign literature of Western European countries. In the exchange of data and research results it is possible to produce knowledge which allows us to understand each other better. The contribution of domestic comparative scholars is crucial from the perspective of further development in this discipline of knowledge, the identification of correlations of Polish experiences with foreign ones, and, thanks to the participation of scholars, entirely new situations, events or project experiences, exchanges of personnel and translations of scientific publications. 'This peculiar situation undoubtedly led to a particular indulgence in inspirations, which other geographies have already treated as well assimilated, and at times as slightly outdated, however, it also gradually made us aware of the necessity of what is characteristic of the cultures in the region – its micro- and macro-history– with the heritage comprising places, communities and perspectives on human creative activity' (ibid., p. 14).

### **Comparativism of diagnostic tools**

Petra Anýžová had addressed the problem of comparability of attitude scales in comparative research in her study (2015). From the methodological and analytical perspective, they must, at the very least, provide intersubjective communicability, to ensure that an interview or opinion poll conducted with respondents is equally understandable to all interviewees, regardless of their country of origin, their nationality, etc. The author therefore analyses the conditions that must be met at the stage of conceptualising research and creation of diagnostic tools to measure the attitudes of respondents. A significant barrier in this matter is the indisputable fact that '(...) no nation is homogeneous in the sphere of its citizens' linguistic resources, modes of expression, level of education, etc., therefore every variable in a questionnaire is always exposed to the risk of prior measurement error, which the researcher must take into account in the course of statistical inference, data analysis and interpretation. (...) The vast differences in language, culture and in the social structures of individual countries make international research analytically valuable, but at the same time pose a fundamental obstacle to the comparison of theoretical concepts and their indicators between the studied communities' (Anýžová, 2015, p. 13).

It does not mean that international comparative research should be discarded because of methodological criticism, when efforts can be made to jointly discuss the various possible variants of diagnoses and to subject them

to research practice transparent to the organisers. There is no doubt that the results of carefully conducted research may have significant implications for the social, public and policy practice of the participant countries. Therefore, the key in this approach is to ensure that the completed measurement is not based on unreliable, flawed data analyses which may lead to negative consequences within society (*ibid.*, p. 13-14).

Undeniably, to conduct cross-national comparative research on the directional personality traits of respondents, i.e. their attitudes, values, aspirations, goals, motivations, spirituality, etc. is incredibly difficult. However, the fruitful practices adopted in this area determine that the diagnostic tools developed may also be applied within the framework of domestic, inter-regional differences between people in precisely the aforementioned spheres. According to Anýžova it is essential that the variables studied are equivalent to each other, that they are operationalised, so they could be comparable despite the differences in time, population and methods of measurement. 'Already in the definition of equivalence, three different levels of comparison are included: 1) comparability of the theoretical concept, 2) comparability of the variables under study, 3) comparability of the scales of their measurement, i.e. the response categories. For the most part, comparability of measurement could be achieved by the fact that respondents, despite their different backgrounds, cultures and social situations perceive, understand and interpret a given concept, a set of possible answers, measurement scale completely similar or at least in a highly similar way' (*ibid.*, p. 21).

In her study, the author demonstrates how differently the same concepts may be understood not only in different countries, but also within a given country when, for example, for some 'traditionalist' means being a Catholic and for others a history-oriented citizen. The same is true for the frequency scale of perception of a given attitude or behaviour. While for some a frequently practised activity takes place e.g. every day, for others it may mean once a month. Therefore, everything is culturally contextualised, in terms of customs, but also geopolitically or due to temperamental differences. After all, a choleric and a phlegmatic react differently to certain stimuli. The situation is similar in school achievement tests. In some countries, the highest mark is 1, while in Poland it is 6. This may therefore affect the approach to the scale of attitudes towards certain variables.

For educational comparativism two research strategies may be relevant, their source being contemporary anthropology. Indeed, the study of foreign cultures may be carried out with an ethical approach (core items, culture in general), i.e. taking into account the external and objective aspect

of the studied culture, e.g. the study of school cultures, or in an emic approach (cultural specific items), with the emphasis on studying a given culture from the inside, referring to the internal organisation, its functioning behavioural patterns, the distinctiveness of the students' mother tongue, etc. (Anýžová, 2015; Zielinska-Pękał, 2014). Thus, the technique of translation of the attitude scale or survey questionnaire into the national language of the respondents drawn for the study turns out to be instrumental. European comparative research in the social sciences uses the TRAPD method – Translation, Review, Adjudication, Pretesting (preferably involving bilingual people) and Documentation (Anýžová, 2015, p. 34).

Anýžová compiled selected statistical techniques to verify the equivalence of attitude scales in a table, which is quoted below for Polish comparativists to have access to the results of her literature search:

**Table 2.** Selected multilevel statistical techniques for testing equivalence of attitude scales

Method	Relevant variable type	Empirical study – application of the method
Exploratory factor analysis	Ordinal and nominal variable (CATPCA)	Welkenhuysen – Gybels, Van de Vijver 2001 (construct equivalence)
Testing scale reliability	Ordinal variable	Devins et al. 1997 (translation equivalence)
Multidimensional correspondence analysis	Ordinal and nominal variables (graphical method)	Blasius, Thiessen 2006 (construct equivalence)
Multidimensional scaling	Ordinal variable (graphical method)	Braun, Scott 1998; Fontaine 2003 (construct equivalence)
Multilevel modelling	Ordinal and nominal variables	(conceptual equivalence)
Structured modelling: <ul style="list-style-type: none"> <li>• Structural modelling</li> <li>• Multilevel structural modelling</li> <li>• confirmatory factor analysis</li> <li>• MTMM design</li> </ul>	Ordinal and nominal variables	(Configuration, metric and scaling equivalence) Mullen 1995; Billet 2003; Byrne, Watkins 2003 Van Hemert et al. 2002; Van de Vijver, Poortinga 2002; Davidov et al.2012 Hsueh et al.2005; Lievens et al. 2007; Davidov 2010 Saris 2003; Saris, Gallhofer 2007; Revilla, Saris 2011 (conceptual equivalence)
Latent class analysis	Ordinal and nominal variables	Kankaras, Moors 2009 (configural, metric and scaled equivalence)
Response theory	Dichotomous variable, ordinal variable	Wang, Russel 2005; May 2006; Woehr, Meriac 2010 (equivalence of translation and scales)

Source: Anýžová, 2015, p. 41.

The equivalence of the measurement of opinions, attitudes, beliefs, i.e. directional characteristics of respondents must not be treated in the light of descriptive statistics as a true value. The latter, in the case of this type of latent variables – as it is impossible to determine them objectively, ‘(...) does not exist, there are only answers of respondents in accordance with their perceptions of the subject of the survey’ (Jabkowski, 2015, p. 25).

### **Theoretical positions and methodological approaches to the construction of theories for comparative research**

In social sciences, theory maps have been developed to identify the school reforms introduced in individual countries together with their possible political, legal and sociological origins. Each of them allows one to notice the influence of ideas on the designed and implemented educational changes, which at the same time serve to diagnose their consequences, their effects on an international scale. The liberation of Polish education from Marxist orthodoxy has obliged educators to expand their knowledge of the geography of thought, its theories and paradigms. It also fosters the debate on the relationship between what is in the centre of the attention of authorities and what is brought by the latest scientific findings, which – if pushed to the periphery – will become a deferred necessity for changes in the educational processes of the younger generations, together with a sense of lost time.

The institutionalisation of practices aimed at creating new, more beneficial, effective, and prospective educational solutions takes time and political will, thus comparativists should at least be read by those in power and political elites, including those in the opposition, to foster the right systemic solutions. The complacency among educational practitioners with regard to reading popular scientific works by foreign authors, teachers, pedagogues, psychotherapists or counsellors of various sorts under the influence of the publicity they receive as allegedly outstanding, as they sell millions of copies worldwide, results in inadequate implementation of para-scientific solutions in the Polish reality concerning education at school or beyond. Practitioners and government authorities are both susceptible to marketing slogans, preferring them over useful products of scientific thought and profound knowledge of the actual conditions of learning and self-development processes. Meanwhile, educational thought is constantly vibrating, changing, joining or leaving a particular current as a result of developing new research paradigms with far-reaching consequences or as a result of criticism of previous approaches to education.

In the process of comparative research, for example, different goals may be pursued with regard to the formulated objective, the research problem and the adopted object of research.

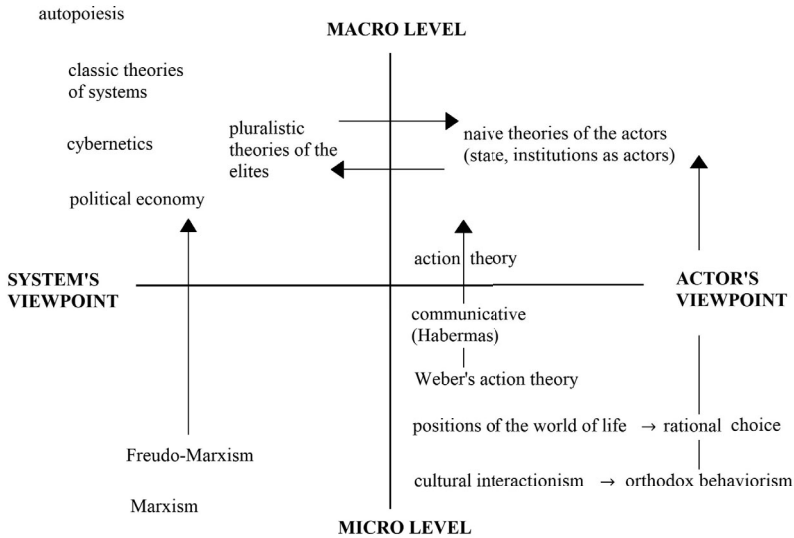
**Table 3.** Objectives, problems and object of comparative studies

	1.	2.	3.	4.
Objective of the comparisons	Description	Explanation	Evaluation	Forecast
Research question	How do the school systems of selected countries differ?	Why do they differ?	What role does national education policy play in the process?	What can we learn from others?
Research object	Ideology of the government, law, state system, school system, educational system, educational paradigm	Extra-school factors, intra-school factors, entity factors	Effects and consequences of education policy	Synergy of factors contributing to quality education

Source: own elaboration based on Geissler, Mouralová, 2011, p. 178.

### **Political maps of theories and methods of comparative research**

Of particular interest in the political sciences is a map developed by Klaus von Beyme, combining theoretical positions with methods for constructing theories and comparative studies on the application of such theories in practice, which is also significant from the perspective of noticing the peculiarities of the educational reforms carried out in the given countries. The four-field diagram reflects a matrix of theoretical positions intersecting on the axis of ordinates and abscissae, which make the starting point the macro- or micro-perspective and the systems approach that is inscribed in it – the macro-system viewpoint or the entity approach – the author’s perspective (von Beyme, 2005, p. 28).



**Diagram 1.** Theoretical positions and methodological approaches to theory construction (source: von Beyme, 2005, p. 28)

Taking into account not only the political regime of the compared systems or educational reforms in the different countries, but also the place in which the authorities' approach to educational reform occurs at a given time, that is, whether a top-down strategy is applied, which is characteristic of a macro-, statist educational policy perspective, or whether the school system is open to micro- or meso- strategies of school reform, of grassroot educational innovation? However, this does not exclude the necessary polar variables to be accounted for, as there remains the point of view permitted by the authorities, which is either systemic in nature or enables the implementation of changes from the perspective of their actors (teachers, parents, pupils). 'In the light of *autopoiesis*, the comparatist of the old school will appear to be a fool, for he strives for the impossible, as he wants to understand that which is diverse and whose code he has not sufficiently explored, or tries to adapt to the system with what is completely foreign to him. Within the circle of *autopoiesis* there is ultimately no understanding (...). The suggestion that systems could learn one from the other is ultimately reduced to code-compliant adaptations. Only where systems are controlled by the same code can the adaptations be recognised at all' (von Beyme, 2005, p. 135).

According to K. von Beyme, the 20th century and the beginning of the 21st century are characterised by the vestigial or systemic inclusion or grassroot participation of educational actors in changes therein, which may serve elites, ideologues or the satisfaction of the needs of those for whom the schools were established or foster a movement towards the viewpoints and interests of both the system as well as the actors. 'Comparison has become of greater significance in the science of politics than in any other social science from the time when science of the state is concerned mainly with national systems, sociology has concentrated on relationship charts and is barely concerned with society as a whole, and economics has replaced comparisons with mathematical models. The danger of such a situation is for political science to be labelled the 'comparative science of governments,' a label that is sometimes applied to studies that do not even attempt to make comparisons, but only involve foreign countries. Therefore, a distinction must be made between the comparative method and the subject scope' (ibid., p. 132).

One might wonder whether the trend towards uniformity of the world or its parts, which intensifies as a result of globalisation, should also lead in the course of comparative research on the school achievements of children in different countries, to a standardisation of school systems and the educational approaches applied within them, or whether educational comparative studies should encourage a tendency towards autonomy of school systems in accordance with their national conditions and cultural codes? According to K. von Beyme: '(...) postmodern theoretical positions have grasped something essential for the future: as the world is becoming more equal, the more radically **the method of differences** has to be applied in the search for persisting dissimilarities. It is only postmodern thinking that has established the primacy of this method over the search for similarities, thus also in this respect it must be considered more a culmination of modernity rather than its defeat' (ibid., p. 136).

The policy of the European Union allows the member states the right to decide for themselves on solutions in, among other things, the sphere of education, though at the same time promotes the funding of research, whose subject matter will serve to harmonise educational practice in preschool and school education in the spirit of so-called good practices, which are the subject of international cooperation and exchange between teachers, pupils and authorities responsible for funding this public sphere. Educators should have a closer look at the methodological approach in comparative political science research, which draws attention to such dangers or methodological pitfalls as the preference for macro-political considerations over smaller

units; the application of national or ideological biases in the context of using statistical data to remain faithful to political correctness or the interests of the party in power; the concealment or reduction of the importance of real political variables; the failure to see in publicly available government data the manipulation or even falsification of reports by institutions subordinate to the government, the omission of hidden functions of aggregated data or the deliberate disregard of systemic differences, and the pseudo-strictness of quantification (*ibid.*, pp. 154-155).

A systemic approach in comparative research makes us aware of the need to recognise the boundaries, beyond which the environments/surroundings exist, affecting the education system in each of the countries studied. 'With the adoption of a systemic approach, these will include among others: the ecological, biological, personal and social system, encompassing the cultural system, the economic system, the demographic system and the social structure. The external surroundings, on the other hand, consist of components outside the state/EU and society, i.e. the international system. With the last system being the object of the study, by contrast, its surroundings will consist of the environment of the international system, which conditions its manner of functioning' (Szymanski, 2010, p. 164).

### **Comparing the incomparable**

Dalibor Antalik formulates a question which is crucial for comparativism: 'Is there a single comparative method, since in the human sciences scholars tend to make different types of comparisons? (...) Humankind has striven and continues to strive for some sort of a 'natural' comparison even without a deeper reflection on the principles and internal logic of such procedure. It might be possible that the centre of the problem here is the oldest, most archaic and at the same time widely spreading intellectual skill. In the more or less developed disciplines of past and contemporary sciences, we will mostly encounter comparisons existing within them' (Antalik 2005, p. 9). On a daily basis, everyone compares and is compared with others as well. The more cultures, faiths, organisations, etc. we discover in the world, the more difficult it becomes to compare them, because the criteria and methods for this comparison become problematic. While it is simpler to find similarities without arousing conflict, suspicion or hostility, it is considerably more difficult or even dangerous to show significant differences between the studied phenomena, since every fact, idea is simultaneously subject to evaluation.

The reports on the state of education published by governments or their agencies are therefore not a reflection of the processes actually underway in

education, but rather constitute a register of legal regulations, 'censored' data or the methods of their collection (Śliwerski, 2019) in order to ensure their political correctness. Any research that unveils appearances, the cognitive dissonance between the state as advocated, idealised by the authorities, and the implemented situation, also raises barriers limiting access to sources and even opportunities for field or institutional research out of fear of the political consequences of revealing the hidden agenda of those in power. The comparatist from outside the country, but from within as well, may be unaware of the different kinds of games, conflicts or trades happening in relation to education or education policy in the various arenas of the education system, where, in the case of coalition governments, there is pressure to impose own approach by one of the parties forming the coalition or in opposition to centrally decided solutions.

'The comparative method assumes the systematic comparison of empirical data on individual political phenomena. It allows for the elimination of erroneous hypotheses concerning uniqueness of the cases that have occurred and extraction of the real causes of specific features of a given social system, be it a single state or the European Union. The three dominant types of comparative analysis are case study analysis, systematic comparison of a limited number of cases and global statistical analysis. It is particularly useful to compare the systems that are most different from each other or most similar to each other, with the latter approach being more popular' (Czaputowicz, 2010, p. 263).

However, what occurs in works of comparative studies on education, is elimination from some reports of data concerning their immediate context (Śliwerski, 2015). Another threat to the comparability of data in these studies is an insufficient understanding of the metalanguage, the metaphors that function in a given society, its cultures, which also have their own language, symbolism. With such a plethora of data on the global education of children and adolescents, and thus an inflation of source materials, the question of the criteria adopted for their selection must be answered in the first instance. As a consequence of the reduction of sources and the difficulty to verify their level of reliability, one realises that the comparison is made between what is in fact incomparable, and yet, there still are differences in the methods used to obtain the data and their compilation. Only due to differences in the religious sphere, attitudes towards the faith of parents and teachers of children or adolescents, would it be necessary to include in comparative studies those comparative methods which are characteristic of religious studies or due to differences in the political systems of states.

As a result of globalisation, diffusion of ideas, methods, and data is also taking place between the disciplines of the social sciences and humanities, which undoubtedly enriches both of them, as well as hinders the ability to discern their key phenomena. It should not be irrelevant for the comparison of achievements of pupils, educational programmes, education funding, training, working hours and gratification for teachers in different countries, etc., what is the political system in those countries, the extent of the rights of educational entities and fundamental civil liberties, the economic development of the country and financial investment in education, social, cultural or religious changes. 'It is obvious – Antalík writes – that any comparative endeavour implies the need to define the object of comparison and to determine the scope of its application from the beginning. Thus, it is logical for another set of problems to unfold. Firstly, they concern the boundaries, the limit of comparisons. Is it even possible to propose models of attitudes, perceptions, actions, etc., which would address sufficiently the history and different cultures? Patterns which would be transhistorical and transcultural?' (ibid, pp. 17-18)

The consequence of the integration, as well as disintegration processes in the countries of the European Union, countries belonging to other political-economic and military communities, along with global and open communication in cyberspace, is that non-territorial participants and actors, who do not represent the interests of their own country or society, also appear in the educational sphere of individual countries and societies. 'In the environment of the continually progressing internationalisation of various aspects of the functioning of nations and states, they are becoming not only more numerous but also increasingly influential participants in international relations. Barry Buzan called them 'human collectivities', to emphasise the difference in their nature from states and state-created organisations. New actors give a new character to international relations, in which the role of states is relatively diminished, thus reducing the usefulness of the realist theory to study these complicating international relations' (Wierzchowska, 2010, p. 33).

Comparativism, arguably, plays a significant role as a defence against social amnesia and confusion of concepts in the consciousness of societies (ibid., p. 14). One cannot demonstrate the equivalence of what is unsimilar when the social systems of different countries are incomparable with each other. Researchers come across diverse state and social structures – from authoritarian, dictatorship, monocultural ones, from closed to multi-party ones, to those which are multicultural, open. It is not without significance

what are the results of parliamentary elections in countries where education reform policies are pursued in a top-down strategy affecting the ideological dimension of the education process, the extent to which it is funded, bureaucratized and legalised, e.g. the autonomy of teachers, the socialisation of education policy, the perpetuation of the class and classroom system, the subordination of the ideology of the party to the authority of the curriculum bases of general and vocational education, etc. Phenomena that are neither completely identical nor completely different may be compared, thus comparative education faces a difficult task. To establish any similarity between the educational achievements of countries with different system solutions and cultural differences is by no means easy. The aforementioned dilemmas do not mean that we should refrain from conducting comparative research or that there is no use for it. 'As the French saying proclaims: 'comparaison n'est pas raison', comparison does not equate to evidence' (Antalík 2005, p. 22).

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## Comparative education and gender

**Abstract:** The purpose of the article is to present the importance of gender studies in comparative education and the role of female scientists in its development. The first part of the text is devoted to the phenomenon of the gradually increasing comparative interest in the issue of gender, both in the research and teaching contexts. Then two basic theoretical approaches to the analysis of gender in comparative education are presented, in the context of the issue of inequality: direct gender inequality and structural inequality (gender, class, race). Both of the approaches are illustrated with examples of research and publications. In the second part of the text, an attempt is made to present the role of women as researchers in the development and organisation of comparative education, with regard to scientific work and holding positions in international associations of comparative education. The article is intended as a contribution to understanding the phenomenon of expanding the problem field of comparative education.

**Keywords:** comparative education, gender, theoretical approaches, women's contribution.

### Introduction

In her 2014 text 'Thinking about Gender in Comparative Education', Elaine Unterhalter writes that 'the history of gender research in comparative education can be perceived as a series of actions relating to [breaking] the silence' that was present in the subdiscipline (2014, p. 115).

An in-depth discussion on gender, aimed at broadening the problem field of comparative education, was initiated, according to the author cited above, relatively recently, in three special issues of such prestigious journals

as 'Harvard Educational Review' (1979), 'Comparative Education Review' (1980) and 'Comparative Education' (1987) (Unterhalter, 2014, p. 115). In turn, the authors of the introduction to the 2004 special issue of the journal 'Comparative Education Review', devoted to comparative studies on women's education, stated that their goal was both to analyse the 'barriers to educational access' and to address the question to what extent 'increased educational attainment among girls and women has (or has not) led to changes in the social construction of gender roles and in the economic and political participation of women (and men) in local, national, and international communities in the context of global forces'. (Assie'-Lumumba and Sutton, 2004, p. 349). However, according to Elaine Unterhalter, unlike in the broadly understood social sciences and humanities, gender issues 'have had less of a resonance in comparative and international education than would be expected' (2014, p. 118).

The situation in this regard has been fundamentally changing with each decade. Nowadays, comparative studies and publications on gender form an integral part of the problem field of comparative education. Numerous books and hundreds of articles are published annually on the participation of women and men in education – in a comparative context. Also, texts regarding this issue appear systematically in major comparative journals such as the aforementioned 'Comparative Education', 'Comparative Education Review' or 'Compare: A Journal of Comparative and International Education.' Chapters on gender issues can also be found in almost all major pedagogical encyclopaedias of comparative education, as well as in textbooks for classes on comparative education at universities. In addition, such chapters can be found in books comparing societies or cultures of different countries.

A number of excellent universities have subjects devoted exclusively to the various gender aspects of comparative research in education. I would mention here, for example: 'Gender and Education in Global and Comparative Perspectives' (Stanford University), 'Gender and Higher Education in a Comparative Perspective' (University of Oslo), 'Comparative and International Perspectives on Gender and Education Policy and Practice' (University of Toronto) and 'Gender, Education and International Development' (University of Pittsburgh). In other cases, modules on gender issues constitute an essential part of programmes related to comparative education.

### **Theoretical contexts of gender studies in comparative education**

The content analysis of selected (possibly representative) texts relating to gender studies in comparative education allows to formulate certain conclusions and to make some reflections.

The fundamental concern in comparative gender education studies relates to the problem of (in)equality. It has a great number of dimensions, however, it refers primarily to the access by women and men in the broadest sense, both to a particular form of consciousness/identity and to a particular type of institutionalised form or level of education. In this regard, comparative analyses of the problem of gender (in)equality in education usually refer to one of two approaches (Gromkowska-Melosik, 2011, p. 36-37).

The first is referred to as the theory of (direct gender hierarchy). Its essence is the belief of male dominance in society and discrimination against women. The core categories involved are gender equality and gender inequality. It is assumed that male dominance and the resulting forms of inequality are structural. Inherent to the present approach is the belief that women and men are 'competing groups with different opportunities' to achieve status and success; including education. In this tradition, the categories of masculinity and femininity are static and internally integrated (occasionally even the different nature of men and women is invoked in reference to biological determinism) (Holter, 2005, p. 17). This approach opposes men and women as social groups antagonistic to each other. It is worth giving examples of publications that directly correspond to this concept: 'Standardised Education and Gender Differences in Mathematics Achievement: A Comparative Study' (Ayalon and Livneh, 2013), 'Gender Stereotypes and Education: A Comparative Content Analysis of Malaysian, Indonesian, Pakistani and Bangladeshi School Textbooks' (Islam I Asadullah, 2018), 'Educational Gender Inequality in Sub-Saharan Africa: A Long-Term Perspective' (Baten, de Haas, Kempter I Meier zu Selhausen, 2021), 'The Challenge of Ensuring Gender Equality in Vietnamese and English High Schools: Espoused and Real Commitments' (Brundrett I Dung, 2018), 'Hidden Transcripts: The Micropolitics of Gender in Commonwealth Universities' (Morley, 2006).

What is often used in the approach based on the idea of direct gender hierarchy are also various, sometimes metaphorical, categories and concepts in comparative study to help explain the phenomenon of discrimination against women. The metaphor of the 'glass ceiling' is used to describe the phenomenon of social mechanisms (blockages) that prevent women from using the educational diplomas, competencies and qualifications they possess in their careers (Purcell, Macarthur and Samblanet, 2010). The glass

ceiling symbolises the visibility of potential promotion and simultaneously its impossibility. In turn, the 'sticky floor' (or 'sticky web') metaphor refers to the 'entrapment of women', regardless of their education, in low-prestige professional positions, with no opportunity for promotion; in particular, referring to women from ethnic minorities. On the other hand, the term 'glass escalator' refers to the situation of rapid, unwarranted promotion of men in professions usually dominated by women (Titkow, 2003, p. 8-10). Excellent examples of the use of said categories in comparative studies with their in-depth educational context are publications that demonstrate the unequal opportunities for women to use their education in the labour market, in their careers; for example: 'The Glass Ceiling Hypothesis. A Comparative Study of the United States, Sweden, and Australia' (Baxter I Wright, 2000), 'Academe's Glass Ceiling: Societal, Professional-Organizational, and Institutional Barriers to the Career Advancement of Academic Women' (Bain and Cummings, 2000), 'Glass Ceiling and Women Employees in Asian Organizations: a Tri-Decadal Review' (Lathabhavan and Balasubramanian, 2017), as well as 'Breaking the Glass Ceiling Philosophy and Reality: A Study of Gender Progress and Career Development in the Corporate World' (Itty, Garcia, Futterman, Austt, & Mujtaba, 2019), 'The Gender Wage Gaps, 'Sticky Floors' and 'Glass Ceilings' of the European Union' (Christofides, Polycarpou and Vrachimis, 2013).

With women's access to all levels of education increasing (or even equalising) in most countries of the world, and in some gaining a statistical advantage over men in numerous fields of study (as early as 2008, Stéphan Vincent-Lancrin wrote about the 'reversal of gender inequality' in this area) (2008), the concept of direct gender hierarchy is beginning to have less relevance in comparative studies. The alternative theory, which has recently begun to prevail in comparative education, attempts to look for 'general trends in discrimination or inequality and their causes, but not necessarily those related to gender hierarchy per se' (Holter, 2005). Gender inequality is analysed here through the lens of broader problems of social stratification. This approach assumes that gender forms only one context of inequality, and that class, racial, or ethnic affiliation is equally important. I would add, however, that critics of this approach point out that, as Ø. Gullvåg Holter states, 'structures of structural inequality are often relatively hidden and difficult to recognise, especially when they appear to be gender-neutral in nature' (2005, p. 18).

Notwithstanding this criticism, however, such a multidimensional approach is playing an increasingly important role, as has been previously

written. Liz Jackson writes that until recently, race, class and gender were - with regard to studies in the spheres of education and social life - usually studied in isolation from each other. In doing so, she cites approvingly Mark Mason's view that in 'comparative educational studies', analysis of educational reality *through* categories of homogeneous boy/girl and male/female groups should be abandoned. Instead, comparativists should consider 'the importance of race, class, and gender as factors which are distinguishable but nevertheless while they interact with each other in a variety of ways that shape the access and achievement of individuals' (Jackson, 2014, p. 213-214).

Such an approach creates a less conclusive picture, in which the woman, as a subordinate person because of her *femininity*, can at the same time be dominant because of her *race* (white race) or *ethnicity*; or conversely. The question then arises, for example, how does the mutual relationship of dominance/subordination between a female white lawyer and a male black ethnic minority worker proceed?

However, this does not mean that the gender binarism approach to comparative analysis has become a thing of the past. And so, in recent times, there have been numerous comparative studies on the differences in scientific productivity between men and women at the higher education level, along with attempts to explain the causes of the 'gender gap' taking place in this sphere. And here women and men are perceived as two distinct homogeneous groups (Aiston and Jung, 2015). Similarly, there are studies relating to the citation structure of scientific publications by women and men, containing asymmetry - always in favour of male authors (Maliniak, Powers and Walter, 2013).

It should be added that many macro-statistical comparisons of various aspects of education still capture the female population as a homogeneous whole and compare it with the male group, as assumed in the concept of direct gender hierarchy. These comparisons concern, for example, the access of women and men to certain types of schooling or fields of study. However, this type of macro-comparative procedure does not exhaust the issue. This is because it blurs the phenomenon of differential access to education for women and men - depending on social group or class, or ethno-racial group. In fact, in many highly developed countries, women from the upper classes have already achieved equality, both educationally and socially, while various forms of inequality still extend to women (but also men) from underprivileged classes - workers, peasants, or ethnic minorities. As a result, it seems that sex/gender is no longer the main criterion for advancing the principle of equality of educational opportunities or educational outcomes

today. Divisions in this regard relate much more to social background. In other words, educational inequality (and also social inequality) is constructed according to class, social group, or ethno-racial group (as well as along urban-rural lines, or by region), and to a lesser extent according to the gender division: women-men (Gromkowska-Melosik, 2011, p. 19-37).

And this is the approach which is beginning to occur with increasing frequency in contemporary comparative education. Examples of the following comparative publications can be given here: 'Education, Ethnicity, Gender, and Social Transformation in Israel and South Africa' (Mickelson, Nkomo, and Smith, 2001), 'Gender Differences in Educational Outcomes and the Effect of Family Background: A Comparative Perspective from East Asia' (it features a comparison of Japan and China with the United States in this regard) (Akabayashi, Nozaki, Yukava and Li, 2020), 'Comparing Race, Class, and Gender' (with reference to comparative research in education) (Jackson, 2014), 'Who Goes to School? Educational Stratification by Gender, Caste, and Ethnicity in Nepal' (Stash and Hannum, 2001).

Notwithstanding the growing prevalence of the second approach outlined above, it seems reasonable to conclude that each of these approaches can be used in comparative studies as well and complementarily. For in some dimensions, or countries/societies or local communities, the dividing lines in access to various forms of socialisation and identity, as well as education and the labour market (careers) still run along gender divisions. In other situations, on the other hand, it seems that it is class, racial or ethnic background that determines that access.

Already from the above considerations, two approaches to comparative research in education with regard to gender issues emerge. Either of them is diagnostic-analytical in nature and its purpose is to obtain, based on specific criteria and research methods used, knowledge of a selected phenomenon or issue. The results obtained often become a point of action taken within the framework of educational policy. For it should be added that the focus on educational change was one of the developmental dynamics of comparative education; Justin J. W. Powell writes about 'the potential of improving education systems by understanding them better through comparison', with educational transfer being a 'continuous feature of comparative and international education.' It represents 'a process in which a local problem is recognised, solutions to similar challenges found in other countries are identified.' Occasionally known as the 'politics of educational borrowing' (Powell, 2020, p. 60).

However, within comparative education, there also exists, in relation to gender, an orientation towards values and sometimes even adoption of a very explicit ideological stance. In such cases, we are dealing with research based on premises of fighting against gender injustice and inequality, wherein education is supposed to take on the role of a catalyst. Publications in this area are often saturated with emotion, which permeates intellectual considerations. Several examples in this regard are worth mentioning; with the most typical ones make a relation between feminism and comparative education: 'Liberal Feminism in Comparative Education and the Implications for Women's Empowerment' (Omwami 2020), 'Liberal Feminism, Cultural Diversity and Comparative Education' (Enslin and Tjiattas, 2004), 'Contributions and Challenges of Feminist Theory to Comparative Education Research and Methodology' (Stromquist, 2003) or the book summarising the comparative-educational thought of Gail Kelly, 'International Feminist Perspectives on Educational Reform' (1996). In all the texts linking feminism and comparative education, the dominant idea is that comparative research should become one of the sources of profound educational change, based on the idea of gender and social justice.

From my own perspective, what appears as particularly interesting are those studies that compare the situation of women, also in the educational context, against the background of their social roles in culturally radically different countries. An example here is the collection of texts published in 2022, 'Comparative Perspectives on Gender Equality in Japan and Norway. Same but Different?' (Ishii-Kuntz, Kristensen and Ringrose, 2022). In this book, education constitutes one of the areas of comparative research, along with family, career, sexuality and media representation. Another similar example, in a 2019 text, refers to a comparison of the social, including educational, situation of women and men in Turkey and Sweden: 'Measuring Gender Equality. A Comparative Analysis of Sweden and Turkey' (Aslan and Doğanay 2019). As in other works in this category, the analyses here are oriented towards the different socialisation and stratification mechanisms in the two countries.

Comparative studies on the situation of women (including access to education) in less diverse cultural settings are also extremely intriguing, as, for example, in the text on women's identity formation in Islamic communities in India and Indonesia (Soaderwo, Yumitro and Zuriah, 2020). Similar in nature is the book 'Patriarchy in East Asia. A Comparative Sociology of Gender' on Japanese, Korean and Chinese women (Sechiyama, 2013), where

various socialisation and stratification dimensions of education are pointed out - in the context of gender.

### **Women's contribution to the development of comparative education**

The second part of my work, intended as complementary to the first, addresses the share of women among researchers in the field of comparative education. In 2020, the book 'North American Scholars of Comparative Education. Examining the Work and Influence of Notable 20th Century Comparativists', was published, which presented scientific profiles of 16 most prominent comparative educators of the previous century. Among them were three women: Mary Jean Bowman, Gail Paradise Kelly and Heidi Anna Ross. They were listed among such undisputed classics of comparative education as, for example, Isaac Kandel, George Bereday and Ronald Paulston (Epstein, 2020).

Mary Jean Bowman (1908-2002) received her PhD from the University of Harvard. As a professor at the University of Chicago, she studied the relationship between education and economics, and published (also in collaboration with the university's Comparative Education Center) a number of significant texts on the application of human capital theory to research and education. Together with Arnold C. Anderson, she edited the book titled *Education and Economic Development* (1965); her major works include: *Educational Choices and Labour Market in Japan* (1981); she also wrote a number of texts on education and economics in Africa.

In turn, Gail Paradise Kelly (1940-1991) was one of the leading representatives of the feminist approach to research in comparative education. Among others, together with Phillip Altbach, she edited the book *New Approaches to Comparative Education* (1986), which included many texts by prominent representatives of this sub-discipline of education, previously published in the *Comparative Education Review*. In addition, she edited, together with Robert F. Arnove and Phillip Albach, the book *Emergent Issues in Education. A Comparative Perspective* (1992). In the field of comparative education, her main interest was the education of women in Third World countries. With Phillip Altbach she edited the book *Education and Colonialism* (1978), and with Carolyn M. Elliot, *Women's Education in the Third World. A Comparative Perspective* (1978) and with Sheila Slaughter, *Women's Higher Education in Comparative Perspective* (1981). She also published many articles on the subject, such as *Failures of Androcentric Studies of Women's Education in the Third World.* From 1986 to 1988 she was vice president and then president of 'The Comparative and International

Education Society.’ Also, was editor of the ‘International Handbook of Women’s Education.’

The last of the vital female figures in comparative education I mentioned above, Heidi Ross (1954-2016) was a professor of Educational Policy Studies and Director of the East Asian Studies Center at Indiana University. In 2001, she was elected president of ‘The Comparative and International Education Society’; she was also co-editor of ‘Comparative Education Review’ for a brief period. She wrote a number of significant works on Chinese education; including the book ‘China Learns English. Language Teaching and Social Change in the People’s Republic’ (1993), or the articles ‘Glocalizing Chinese Higher Education: Groping for Stones to Cross the River’ (2005), ‘Educating Girls as Community Leaders: Contradictions in one Spring Bud Project in Rural Shaanxi, China’ (2008, with L. Wang). In addition, she is the author of a number of texts on the use of qualitative methodology in comparative research; among others, she is co-editor of the book ‘The Ethnographic Eye: Interpretive Studies of Education in China’ (2000).

In turn, the compendium edited by David Phillips published in 2020, ‘British Scholars of Comparative education. Examining the Work and Influence of Notable 19th and 20th Century Comparativists’, which incorporates the texts of the most important British comparativists (including Michael Sadler and Brian Holmes) features one woman - Margaret Sutherland (1920-2011) (Phillips, 2020). In the 1970s, she was Dean of the Faculty of Education at the University of Leeds. She also served as president of the ‘British Association for International and Comparative Education’ and the ‘World Association of Educational Research’ as well as played an active role in the ‘Association Francophone d’Education Comparee’. Her main interest in the field of comparative education related to various issues of the relationship between gender and education, including the perception of their careers by women working at universities in different countries of the world. In this regard, she published ‘Women who Teach in Universities’ (1985), a book on female academics in Finland, East Germany, the United Kingdom and Germany. She is also the author of ‘Sex Bias in Education’ (1981), ‘Theory of Education’ (1988), ‘Femmes et éducation. Politiques nationales et variations internationales’ (with Claudine Baudoux) (1994), and author of such texts as, among others: ‘Comparative Education and Literature’, ‘The Role of Women in Higher Education’ (1985), ‘Whatever happened about coeducation’ (1985), ‘Gender Equity in Success at School’ (1999); ‘Raising and Falling: Comparative Education and Teaching and Research in Scotland’. From 1975 to 1985 she was editor of the ‘British Journal of Educational Studies’. The importance of

this figure in the recent history of education is evidenced by the establishment of the 'Margaret Sutherland Prize in Comparative Education' - a biennial award presented by the 'Comparative Education Society in Europe' for an outstanding comparative publication for a woman in the earlier stages of her academic career.

One has to mention also the most prominent comparativists in Polish education. Anna Mońka-Stanikowa (1907-2007), who headed the Department of Comparative Education of the Faculty of Education at the University of Warsaw, is the author of the books: 'Schooling in Modern Belgium' (pl. 'Szkolnictwo w Belgii współczesnej') (1963), 'Swiss Schooling in Light of Contemporary Educational Tendencies' (pl. 'Szkolnictwo szwajcarskie w świetle współczesnych tendencji oświatowych') (1970), and 'Secondary Schooling in Western Countries' (pl. 'Szkoła Średnia w krajach zachodnich') (1976). In turn, Eugenia Potulicka, for many years head of the Department of Comparative Education of the Faculty of Educational Studies at Adam Mickiewicz University and president of the Polish Society of Comparative Education, made a huge contribution to the development of Polish comparative education in the form of such publications as: 'University Remote Education in Western Countries' (pl. 'Uniwersytecka edukacja zdalna w krajach zachodnich') (1988), 'The Origins of the 1988 Education Reform in England and Wales' (pl. 'Geneza reformy edukacji w Anglii i Walii z roku 1988') (1993), 'Neoliberal Education Reforms in the United States. From Ronald Reagan to Barack Obama' (pl. 'Neoliberalne reformy edukacji w Stanach Zjednoczonych. Od Ronalda Reagana do Baracka Obamy') (2014), 'Education of Racial and Ethnic Minorities in the United States' (pl. 'Edukacja mniejszości rasowych i etnicznych w Stanach Zjednoczonych') (2016), 'Two Paradigms of Thinking about Education and its Reforms: Pedagogical and Global-Neoliberal' (pl. 'Dwa paradygmaty myślenia o edukacji i jej reformach: pedagogiczny i globalny-neoliberalny') (2019); she co-edited the book 'Education Systems in European Countries' (pl. 'Systemy edukacji w krajach europejskich') (2013). Renata Nowakowska-Siuta, Dean of the Faculty of Social Sciences at the Christian Academy of Theology, chairwoman of the Team for International Comparative Studies of the Committee on Pedagogical Sciences of the Polish Academy of Sciences (PAN), is the author, among others, of such significant comparative publications as: 'The University in the German Higher Education System against a European Comparative Background' (pl. 'Uniwersytet w systemie szkolnictwa wyższego Niemiec na europejskim tle porównawczym') (2005), 'Comparative Education. Problems, state of research and prospects for development' (pl. 'Pedagogika porównawcza. Problemy,

stan badań i perspektywy rozwoju’) (2014), ‘Romantic and Pragmatic. The Idea of German Neohumanist University and its Social Implications’ (pl. ‘Romantyczny i pragmatyczny. Idea niemieckiego uniwersytetu neohumanistycznego i jej społeczne implikacje’) (2018), ‘On Education in Finland. A Study in Comparative Education’ (pl. ‘O edukacji w Finlandii. Studium z pedagogiki porównawczej’) (2021), ‘Rationality of the Educational Process. A Study in Educational Policy and Comparative Pedagogy’ (pl. ‘Racjonalność procesu kształcenia. Studium z polityki oświatowej i pedagogiki porównawczej’) (co-authored with B. Śliwerski, 2015).

In 1998, Erwin H. Epstein, a well-known American educator and comparative director of The Center for Comparative Education at Loyola University Chicago, presented, on the pages of ‘Comparative Education Review’, the results of his analysis of a comparison of the number of texts published by women and men in the journal between 1957 and 1997. It turns out that since 1978, the number of female authors has been increasing, and in 1995 it reached 45.7% of the authorship of the total number of texts (Epstein, 1998). In 2016, on the contrary, American comparatist Patricia Bromley (from the Center for Comparative Studies in Race and Ethnicity at the University of Stanford) conducted a ‘research project’ during her classes in the subject ‘Introduction to International and Comparative Education’ - in order to ‘analyse longitudinal changes’ in the content of the journal ‘Comparative Education Review’, between 1957 and 2016. Among other things, this project involved an analysis of the profile of authors of articles published in the journal. The individual chapters of the report were prepared by the project participants. It was found that - in a selected sample of 59 issues of the journal from said period - in the case of the first co-author, the authors of 211 articles in said period were men and 61 were women; while with regard to the second co-author, 41 were men and 28 were women. Thus, the asymmetry in favour of men is very clear at this point, although it has been decreasing decade by decade, and in the 21st century there has already begun to appear a balance in this regard (Coelho, Gavril, Khoo, & Mendoza, 2016, p. 99, 101).

Women are also now sitting on the governing bodies of comparative education societies and organisations. Susan Robertson of the University of Cambridge is president (elect - 2023-2024) of the ‘Comparative and International Education Society’ and Halla Holmarsdottir of Oslo Metropolitan University is vice-president of the latter institution (2023-2024); the secretary and treasurer are also women (CIES, 2023). The vice presidents of the ‘Comparative Education Society in Europe’ are Terry Kim of the University College of London and Cathryn Mango of the University of Fribourg (CESE,

2023). Finally, the position of president of the ‘World Council of Comparative Education Societies’ is held by N’Dri T. Assié-Lumumba of Cornell University (WCCES, 2023).

### **Conclusion**

In conclusion, I would like to say that in the historical perspective, we can speak of the growing importance of the problem field concerning the study of gender within comparative education (using a variety of theoretical approaches and concepts) and the role of women as comparativists - both in a strictly scientific context and in terms of the organisation of science. Thus, it can be stated, following Elaine Unterhalter, that the ‘comparative potential of gender as an analytical or normative idea and its articulation within education’ (2014, p. 112) is being used increasingly in comparative education.

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## **Comparative education in search of a processual model for dealing with cultural diversity**

**Abstract:** As the world becomes more and more culturally diverse, an accurate knowledge of the influence of cultural factors on the mental processes of an individual and the construction of social capital become increasingly important for our ability to effectively understand differences in culture. How can we cope with this task in everyday life? What is the relevance of comparative education in this process? One solution could be to create a certain intellectual map of cultural similarities and differences to which we could refer at any time in order to better understand the diversity around us. Such a peculiar encyclopaedia of knowledge about the diversity of the world has not yet been created, and it is unlikely that it will, given the dynamics of social processes, the multiplicity of events and ways of understanding them. Then how can a rational model for dealing with cultural diversity be created? In this article, I want to draw attention to the importance of comparative education in the creation of such a model, taking into account the relatively new position of comparativists recognising that a considerably important role in the process of coping with cultural diversity and difference is played i.a. by dialogic memory.

**Keywords:** comparative education, cross-cultural communication, cultural memory, cultural differences.

## **Introduction**

Why do we study different cultures? What role does comparative education have in this process and what is its essential value in this respect, in contrast to other sub-disciplines of education and other disciplines of the social sciences? Can comparative research serve as a valuable element in the process of coping with cultural diversity? Is it possible to build a model for dealing with the multiplicity of cultures based on comparative research? I address these and a number of other questions in this article in order to demonstrate the importance of comparative research in the world of inevitable diversity, inconsistency, heterogeneity and accompanying cognitive and emotional references to others, often perceived as strangers, different and sometimes threatening the hitherto coherent identity of societies and national groups.

Until we become aware of the motives behind our strategies of dealing with multiplicity and difference, a plethora of facts about cultural similarities and differences will remain just what they usually are - a layer of information. We study other cultures primarily to improve the quality of our lives and our relationships with others. If we fail to find a way to put the acquired knowledge to good use, the chance to improve the quality of life, both of our life and that of others, will be lost. The essence of comparative education, therefore, is to find a way to make use of the established facts, to make them a means to achieve the goal of mutual understanding and respect between the diverse perspectives on the world and the place of the human being in said world. This way, comparative education becomes, as has been more evident in recent times, not only an idiographic but also a nomothetic science. It establishes and analyses the regularities governing the world of social life. It is not only a description and analysis of the elements of educational policy in individual countries, as it was perceived a decade ago, but it is changing dynamically in the direction of the creation of new models, new areas of exploration of social life, examining social phenomena that build social capital, such as trust, community, prosociality, in order to determine the rules governing the way societies function through the juxtaposition of variables and indicators, to analyse and compare the various models that already exist in individual countries and, in the final phase, to determine the scientific possibility of their implementation in other countries and national communities. It is no longer enough for comparative education to merely describe and explain the organisation and main tasks of education in individual countries. Similarly, the inclusion of international elements in analyses of selected social problems is not enough. Comparative education,

as can be observed even in the topics which belong to this sub-discipline of the educational sciences undertaken worldwide, increasingly displays the ambition to determine, on the basis of analyses of international solutions, the causes, effects, rules which determine the success or failure of social actions, including those within the field of education.

### **Trust as an element of social capital and uninterrupted intracultural and cross-cultural communication**

Knowledge simplifies the understanding of processes taking place in the world which is increasingly culturally diverse, yet people are influenced more often by their emotions than by their desire to acquire knowledge. Emotions, especially the negative ones, take control over our behaviour and even those who are usually able to critically analyse problems and, in most situations, act ethically and sometimes altruistically, are unable to think and act in a rational manner under the influence of negative emotions. Regulation of emotions, critical thinking and openness are essential qualities not only to foster proper interpersonal and intercultural communication, but also the most significant factors for one's personal development. This model of personal development is inherently a developmental one. As a result of critical thinking about cultural differences, as well as due to flexibility and openness to new ideas, new ways of perceiving others are developed, the existing hypotheses about others undergo reformulation creating new constructs within ourselves, which we can call higher-level reflection, shifting our thinking from one extreme to the other, that is, from denial of differences and belittling them to adaptation and integration. The development of critical thinking in individual persons builds social capital and turns the world into a fascinating meeting place for different cultures, different ways of experiencing and understanding the world.

Emilé Durkheim wrote that 'some believe that in order to learn about the nature, functions and causes of the division of labour, it would be sufficient to analyse how each of us understands it'. (own transl. Durkheim, 1933, p. 46). If we replaced the terms 'division of labour' with 'trust', we would arrive at a similar characterisation of the understanding of the concept. The degree of trust or distrust towards another person can be influenced by knowledge of the person and understanding of their behaviour. To trust someone means to have adequate information about the person we want to trust, especially regarding his or her intentions towards us. It is therefore possible to mistakenly trust or distrust someone because one has inadequate or incomplete information about the other. However, if we consider the matter of trust as

a category of social life, we can conclude that trust spreads vertically and horizontally, thus, from one local organisation to another, as well as from a local group to a higher authority. This positive perspective has not been properly studied, there exist merely some scattered theories on the subject. Gabriela Montinola (2004, p. 298) asserts that one may observe the opposite process: distrust towards one institution generates distrust towards others. She argues that it is not possible, for instance, for citizens to trust those in authority when the former lack the knowledge to define real intentions of the latter. In either case, trust is a matter of choice. The antidote to a lack of public trust can be, and generally is, transparency and clarity of actions, preceded by an open and transparent process of lawmaking.

Thus, for instance, in the Finnish society, one observes active trust, which is a mechanism of social solidarity, based on monitoring the honesty of the other person and the institutions of the state in an open and continuous manner. Citizens are willing to trust each other as democracy gives them protection against potential abuse of trust, however, for democracy to function efficiently, people need to trust others. Trust is therefore both a condition and an effect of democracy. Finland leads the rankings regarding public trust. The level of public trust in the state institutions and of people towards each other is high, the police and the legal system are relied on, which is also influenced by a low level of corruption of state officials and representatives. Finland is not a country free of crime, but it is one of the safest. This is also a result of active trust. Active trust has to be renewed, it implies openness, the ability to use new information and public audacity/courage, also evident in educational solutions.

The issue was considered quite differently in English political thought, which for many centuries was dominated by the approach of, among others, David Hume, Adam Smith and Michael Oakeshot, regarding the emphasis on distrust towards those in power. However, today it is not a popular belief and in fact, apart from the work of Prime Minister Margaret Thatcher, no major political party has made such an assumption a part of its own political agenda. On the contrary, the predominant stance is mostly one advocating for the need to embed trust in the authorities. It is clear that trust in those in power is not the same category as trust in a friend or acquaintance. However, there is a thread connecting the two relationships. The failure of an individual relationships most often reflects the relationship between the government and the citizens. Social capital based on trust, community, causality, pro-sociality, constitutes the foundation for the construction of a model to deal with the diversity of the social world. According to the typical definition, social

capital refers to such features of organisation of a society as trust, norms and connections which can increase the efficiency of this society by facilitating coordinated action (Putnam, 1995, p. 258). Coleman claims that social capital is defined by the functions it performs. It is not formed by single individuals, but by the sum of individuals who share the fact that they facilitate the work of other actors (Coleman, 1998, p. 598). One may conclude, already on the basis of these two discussions of the definition of social capital alone, that it enables the society to act without resorting to legal sanctions. It provides the context that protects the individual from abuse at the hands of others (Macneil, 1980). Thus, the social capital may be a substitute for the institutional capital, informal measures based on social capital may substitute for formal measures, such as the control of the hierarchical conformity of legal norms. High level of social capital appears to be significant for the achievement of social well-being: high economic levels, effective functioning of institutions of state and law, low crime rates, etc. (Brehm and Rahn, 1997, p. 1000).

An illustration of this point may be found in the experience described by Alexis de Tocqueville in his book 'On Democracy in America'. During his nine month journey across what was then a young America, between 1831 and 1832, the author encountered an astonishing variety of associations and social organisations formed spontaneously for an array of reasons. He was astonished by the phenomenon of formation of social groups based on responsibility for the local environment (Tocqueville, 1996). Today, we would understand this phenomenon precisely as the formation of social capital which inspires the democratic system. An essential concept here is how trust, rules, social networks that are of importance at the level of individual functioning enable the actions of formal institutions including the executive power. Already in the late 1990s, Putnam wrote about the disappearance of the effectiveness of government institutions in the United States, similarly Francis Fukuyama pointed out the relationship between trust and economic performance, with the mediating variable for him being cross-cultural differences in the interpretation of the concept of trust (Fukuyama, 1997; Hollis, 1998). In order to understand the central issue of the level of trust in different societies, we would need to establish whether trust is derived from interpersonal capital or whether it is itself a category of interpersonal capital. Putnam and Fukuyama lean towards the latter option. The fact that we teach our children to be trustworthy, for instance, creates institutions which motivate us to be trustworthy and influences us to enter into lasting relationships with others, which are a part of interpersonal capital. In turn, this sets the framework for social interaction. The concept of social interaction was

introduced to sociology by Max Weber, who used the term 'social action'. He defined it as directed towards another person and oriented, in its course, according to the actual or expected reaction of the latter (Weber, 2011). Thus, if we recognise that a different culture is represented by another human being, the perspective of understanding the tasks of cross-cultural communication (interaction) changes.

The prototype of interaction is conversation. If people fail to talk, close themselves off, remain silent towards each other, it proves that the situation is extraordinary, unusual, implying alienation and, as a result, a lack of any understanding. Silence does not solve any problem, it is in itself a message - I refuse to speak with you - I refuse to acknowledge your reasons or I am indifferent to what you think. The absence of words spoken to each other is the absence of any desire for interaction. Of course, there is also silence which expresses concern towards another person. In the atmosphere of a Warsaw or London metro, passengers often hide their faces from each other behind a book, disappear behind the screen of a smartphone to avoid eye contact with a potential other - the enemy. Such defensive isolation also occurs in conditions of various oppressions, including the rule of repressive regimes. Gabriel Garcia Marquez, for example, described Chile during the Pinochet dictatorship: 'Wrapped in dark coats, they seemed separate in a foreign city. The faces were expressionless, revealing nothing, not even fear' (own transl. Marquez, 1986, p. 16). I am afraid of the other, meaning I do not trust his or her intentions. Distrust triggers negative emotions and activates processes of mutual accusation. On the other hand, it is important to remember that having trust, loyalty and reciprocity in someone can be wrongly targeted, met with disloyalty and our trust being used to manipulate us. Morality, as Piotr Sztompka writes, does reward moral people. (Sztompka, 2016, p. 329). Authentic moral capital, however, must be inclusive, universalistic in nature. Excessive control, monitoring of others, even in communities with high internal social capital, may restrict individual freedom, lead to the "freezing" of traditional institutions and a failure to align with contemporary living conditions. Examples include various social enclaves and, on a broader scale, fundamentalist religious communities. At the micro level, the family may also sometimes lock its members in a 'golden cage', depriving them of the chance to be independent, resourceful, to pursue individual goals, experiment with different social relations in the name of their own particular understanding of family values. Social capital represents value when it is spent with moderation, in a way that is free from manipulating others and using them cynically for one's own selfish gain. Whether at the

micro-, meso- or macro- level, building community and trust can sometimes be a risky game, but there is no other option to adequately find our way in the patchwork, heterogeneous modern world.

**My world - your world and never a common one. Dilemmas of intra-cultural and cross-cultural communication**

During intracultural interactions, interlocutors follow similar unwritten rules. They encode and decode messages using the same cultural codes. When we communicate with others within the boundaries of a common culture, we form an implicit judgement about our interlocutor being a member of our cultural group or about their behaviour being socially acceptable. When we communicate with members of our own culture the communication process runs smoothly as we share with our interlocutors the same codes and rules of encoding and decoding. However, even during intracultural interactions, we often react negatively, if our interlocutor crosses the boundaries of what we consider to be socially and culturally acceptable. In such a situation, we often make negative dispositional attributions, judging the person, for example, as ill-mannered or even rather dumb. Thus, even in intracultural communication, stereotypes can arise due to our cultural filters and our ethnocentrism which contribute to the formulation of a set of expectations of others. What is required for stereotypes to change is content processing (Forgas, 1994), which is, however, largely influenced by emotions. If emotions are negative, they foster negative attributions and thus perpetuate our original expectations and behaviours. While cross-cultural communication is a very similar process to intracultural communication, the participants in intracultural communication do not always follow similar rules. Interlocutors have difficulty concentrating on the content of communication as they encode and decode it through different cultural codes. Cross-cultural communication is therefore often accompanied by uncertainty and conflict. Dutch researcher Geert Hofstede concluded from his analysis of the intercultural competence of members of multinational corporations that there are four basic dimensions of comparing cultures (Ting-Toomey, 1988, pp. 39-59). The first is power distance: the extent to which the weaker members of society accept the fact that power is unequally distributed (Ting-Toomey's research shows that the Americans represent a low level here, while the Japanese a medium one). The second dimension is clearly defined gender roles: as a rule, it is men and not women who are associated with the right to success and social dominance (Americans - high level, Japanese - very high). The third dimension is uncertainty avoidance - the extent to

which people feel threatened by ambiguity and form beliefs to avoid it (Americans - low level, Japanese - very high level). Finally, there is the fourth dimension, individualism, which is the degree to which people turn to themselves and their relatives, rather than identifying with a larger group responsible for looking after them in exchange for group loyalty (Americans - very high level, Japanese - low level). Many comparative scholars agree that Hofstede's distinction between individualism and collectivism identifies a fundamental dimension of cultural differentiation. Cultural anthropologist Edward T. Hall described the communication style characteristic of collectivist cultures as being of a high context and that of individualist cultures as being of a low context, and divided groups of people on the basis of how they interpret the meaning of messages. Hall hypothesised high context communication to be characterised by the fact that the majority of information is either contained directly in the physical context or internalised by the individual, with only a minor part falling within the coded and directly transmitted portion of the message. The low context specific communication is different, with most of the information falling within the direct code (Hall, 1959, p. 95). William Gudykunst took a similar comparative approach in his study of intercultural communication. He was intrigued by the possibility of taking into account that senders, whose message is of high context, may feel more doubtful about the Other's speech stylistics or behavioural skills of the latter than in the case of low context circumstances, such as similarity of attitudes or ability to communicate openly. What happens when we try to communicate within a culture which is foreign to us? Gudykunst uses the term 'effective communication' to describe the process of minimising misunderstandings (Gudykunst, 1988), and considers communication to be effective when two people are able to predict behaviour and clarify it to each other in such a manner as to reduce anxiety and uncertainty. However, the scripts that arise from our life experiences often determine our communication with others. Behaving on the basis of established scripts is helpful when the roles assigned to us are familiar and acceptable and all actors in a scene of life know their lines. In a cross-cultural situation, on the other hand, the script can condemn participants in the communication process to misunderstanding, tension and confusion. Well established patterns do not work when the communicating parties know little about each other. Routines and scripts may put us at risk of our interlocutor's irritation, of ridicule and may sometimes lead to conflict. Not everyone in a group shares the same values or behaves according to the accepted norms, but everyone recognises them as specific to their group. Cross-cultural differences

constitute, therefore, differences in thinking about the values that guide human behaviour, the norms to which we conform, and the ways of behaving and communicating that are considered appropriate by a given cultural group. Communication between cultures takes place through various elements of the broader culture, namely language, media, art, in everyday contacts, attitudes and behaviour. Language allows one to navigate the realm of verbal understanding, though what is of even greater importance at the intersection of cultures is the non-verbal and contextual communication. After all, depending on the recognised values and replicated cultural scripts, each message can have a different meaning. Language barriers and perceived inconsistencies in verbal and non-verbal communication are particularly prevalent causes of misunderstandings and conflicts between representatives of different cultural backgrounds. Stella Ting-Toomey and Atsuko Kurogi (Ting-Toomey & Kurogi, 1998) believe that the effectiveness of intercultural communication is determined by the equality of both parties, impartial mutual listening, not assigning blame to anyone and appreciation of the feelings and needs of others. Modern times bring additional problems of cross-cultural communication due to rapid changes in social identity. It is a particularly qualified type of social bond, distinguished, as Piotr Sztompka writes, by '(...) a sense of emotional community not with a single partner, but with an entire and realistically existing social group or statistically distinguishable social category about which we think "we"' (Sztompka, 2016, a. 136). In an atmosphere of freedom of choice and construction of identity, new references for it are created, new collectivities about which we say 'we'. Sometimes, when identity becomes an object of deliberate construction, there emerges a possibility of feigning it in order to gain specific benefits, for example, to gain an unwarranted prestige in life or at work. In modern society, social identity loses its traditional constancy. Social mobility, fluctuation of statuses and roles, group affiliation can lead to confusion and loss of a sense of inner stability and unambiguous identity. What is characteristic of the identity bond is its omnipresent complement from the category of strangers. For every 'we', there is a corresponding 'they', against whom various forms of distance, discrimination or rejection are created. An entire scale of otherness can be constructed. Religious wars between fundamentalists and people of different denominations, ethnic cleansing and, in extreme cases, genocide, are all the result of defining the hostile Other in the above-mentioned manner. The Holocaust in the 20th century or years of destructive wars waged in the 21st century show the persistence of the mechanisms of rejection and the inability to overcome hostility towards otherness.

Unfortunately, rejection leads to a spiral of hostility. Isolated groups tend to become increasingly isolated, more and more attached to their own beliefs and customs, cherishing their own otherness and seeing it as a bonding agent for their own sense of uniqueness. In such conditions, assimilation or integration as mechanisms for the inclusion of isolated groups do not stand much of a chance when confronted with the phenomena of ‘enclavisation’ and ‘ghettoisation’ (Melosik, 2021, p. 39). The recent experiences of the Scandinavian countries, the Netherlands, France, the United Kingdom, Italy or Germany, where ethnically, religiously different immigrant communities are particularly numerous, indicate just how difficult and distant assimilation is and how local communities often feel threatened by the sometimes rather aggressive affirmation of their own otherness by migrants settling in these countries. One might say that a distinctive feature of cross-cultural communication is the inevitability of conflicts and misunderstandings. The ambiguity of messages, the difficulty in interpreting them leads to anger, frustration and, as a result, conflicts and mutual resentment. The reason for these conflicts is usually uncertainty and lack of trust.

### **In search of a model for dealing with cultural diversity**

As the world becomes increasingly culturally diverse, an accurate knowledge of the influence of cultural factors on mental processes and the construction of social capital becomes even more significant for our ability to effectively understand cultural difference. How can we live up to this task in everyday life? What relevance does comparative education have in this process? One solution could be to create a type of an intellectual map of cultural similarities and differences to which we could refer at any time to better understand the diversity around us. Such a peculiar encyclopaedia of knowledge about the diversity of the world has not yet been and is unlikely to be created, given the dynamics of social processes, the multiplicity of events and ways of understanding them. Then how does one create a rational model for handling cultural diversity? I would like to draw attention to the importance of comparative education in the development of said model, taking into account the relatively new position of comparativists who recognise that cultural memory and its unique type, dialogic memory, is of considerable significance in the process of coping with cultural diversity and difference.

We live in a time when the requirement for critical reflection on constructions of memory gains momentum. Countries and societies are looking at each other’s memory and often question the determinants of memory. ‘In the 19th and 20th centuries,’ writes Aleida Assmann, ‘the age of nations, each

national memory in Europe was shaped in a polemical confrontation with neighbouring countries, without any regard for them. What was celebrated in one country was something that another tried to forget, what was considered a disgrace in one, was celebrated in another' (own transl., Assmann, 2007, p. 43). Perspective constructions of national memory violently clashed with each other creating excellent material for conflict. The 21st century brought hope in the first decade for rapprochement of perspectives. Indeed, nations are currently stronger linked due to economic and ethnic globalisation. The bearer of the new ethos is the transnational public opinion, which, because of the media, gains importance and seeks recognition of universal norms and intercultural standards. The new perspective aims to observe the collective construction of memory and to critically analyse potentially difficult and conflicting transcultural relations. However, above the communicative and collective memory, another level must be placed – the cultural memory. Cultures are, each in its own way, systems of protection against widespread forgottenness. Cultural memory serves to transmit experiences and knowledge across generational boundaries, thus producing the lasting social memory. Cultural memory achieves its stabilisation through the intensification of symbols and strong emotions, it relies on media and institutions which foster such memory. The transmitted repertoire of cultural memory - artefacts such as texts, sculptures, paintings, monuments and temporal orders: rituals, celebrations, customs, require constant adjustment and renewal in the course of debates and discussions. However, the problem of cultural memory lies in its detachment from the living and dynamically changing consciousness of individuals. It has been contrasted against social memory, for which the problem is unification and politicisation. While the social/collective memory defines the shared experience and the common will, cultural memory serves the citizens to communicate with each other in a longer historical perspective and to reassure them in the identity based on shared participation in a multi-generational tradition. In the 1990s, Europe developed two main strategies of policy concerning memory. On the one hand, the politics of history under the label of a new ethos of national self-criticism and a willingness to face the dark sides of one's own history, to take responsibility for crimes, and on the other hand, the politics based on an ethos of pride which reinforces the selective view of historical events and erases what is shameful for the nation. Can this polarisation of memory be replaced by a dialogical memory? The aim is to liberate the memory patterns from the boundaries set by both sides. Building a dialogical memory is the task of immense difficulty, since the memory of nations is generally organised in the form

of a monologue. In other words, national memory tends to narrow history down to a fragment acceptable to the nation in question. The monologic nature of national memories was criticised, among others, in the 1920s by Marc Bloch, who wrote: 'Let us finally stop the endless talk about national histories without understanding each other' (own transl., Bloch, 1925, p. 42). Perhaps this is a utopian project, yet it seems that dialogic memory can provide an alternative to the monologue of memory as a form of dealing with the history of nations and states which is largely a history of violence. In addition, it represents a great cultural opportunity to work through the past. The aim, in fact, is not to remove the historical experiences from the memory of any nation, but rather to create rules for a dialogic approach to memory. The contextualisation used in this process is a cognitive operation and is made possible because of and through education and the awakening of historical awareness. A post facto insight into the historical context does not have to close the mouths of individual experiences; on the contrary, by making individual experiences visible, they can be integrated into a broader scope and their memories can benefit from confrontation with other memories. In the battle of contrasting memories and the competition over whose sacrifice is more significant, the lack of space in the nation's memory is always at stake. One's own suffering occupies much of it, leaving no space for the suffering caused to others. The asymmetries of memories further highlight this problem.

Jorge Luis Borges, in an essay titled 'Shakespeare's Memory', writes: 'The memory of man is not a sum; it is a chaos of undefined possibilities' (own transl., Borges, 2000, p. 32). This statement is puzzling, for it calls into question the existence of a coherent memory which takes into account the criteria of form and content, the social and the cultural ones. Implicit in Borges' opinion is the unspoken thesis that each of the aforementioned criteria towards memory can be unreliable. Memory is not objective in principle. Memory always belongs to someone. Both the individual and the social one, related with the distinctiveness of a given group, the sense of identity which is strengthened and cultivated through it. Memory can bring people together and create a network of shared understandings of identity, it can also effectively divide people and the boundaries of such division may follow extremely tangled patterns. Memory is both a process and a phenomenon. The separation of individual memories from fiction and confabulation, the representation of different views of the same issues in various societies or nations, such as the memory of Nazi crimes in Germany and Poland, or the memory of the political and social upheaval of 1989 in both countries,

and subsequently the representation of these phenomena and processes in school textbooks, may be an example of how difficult and even painstakingly meticulous the work of comparing and reconciling meanings in two different societies is, as we are witnessing nowadays (again) listening to political manifestos on the invalidation of numerous years of building up the German-Polish cooperation demanding both remembrance (of certain selected issues in these relations) and oblivion of others at the same time. The same is true of the Polish-Jewish dialogue, as well as the British-French, German-French, Polish-Ukrainian, Bosnian-Serbian etc.

Cervantes wrote in *Don Quixote* Part One, Chapter Nine: '(...) truth, whose mother is history, who is the rival of time, depository of deeds, witness of the past, example and lesson to the present, and warning to the future. (Cervantes, 1938) Is history indeed the mother of truth? Or perhaps history, which we are an incidental part of, is but a kind of palimpsest on which the traces of the previous deeds of our predecessors remain visible? Possibly, our reading of our own history, of our own nation, of other nations and cultures, is also based on deliberate anachronisms and misattributions? In the course of socialisation, the individual is asked to adopt as their own a set of values and ideals, which determine the nature of the group's lifestyle. This style must be presented to and accepted anew by the next generation. It is impossible to predict in advance whether a given generation will adopt the lifestyle offered by its predecessors. When individuals, who have received the same education as their ancestors, no longer endorse the values which shaped their parents' group lifestyle, the socio-cultural system does not die perhaps, but disintegrates, dissolves on its own. Socio-cultural systems do not have a life of their own, they exist solely as a function of the choices of individuals deciding to live their lives in one way and not the other. If individuals cease to choose a particular model of life - that model ceases to exist. When a generation decides not to honour the received socio-cultural heritage as its own model of fulfilling life, we become witnesses to the disappearance of the hitherto existing set of artefacts of cultural memory, often including values important for the predecessors, which are no longer relevant for the next generation. Socio-cultural systems do not become extinct, they are abandoned, new ones are not born, but are constituted by the next generation of people who have decided to structure their thinking about the future in a new way. The process of socialisation can be described as a process of ancestral substitution, as a requirement addressed to individuals to behave as if they were actually descended from historical or mythical models rather than those of their genetic heritage. The conflict between an individual's commitment to genetic

ancestors and their commitment to culturally transmitted ancestral models implies the necessity of substituting a culturally supplied 'set' of ancestors in place of their own. Erwin Schrödinger describes life as reducing positive entropy in specific space-time locations by borrowing negative entropy from the immediate environment (Schrödinger, 1998). Historical relationships establishing presumed genetic links between sets of selected ideal ancestors and the socio-cultural systems, which use them to legitimise their goals or intentions, serve a similar function. It seems that an organised past is essential to people just as much as an organised present. As we choose the past, we choose the present and vice versa. We utilise one to justify the other. The problem of multicultural societies is to find common ground, common cultural ancestors for the multiplicity of cultures, religions, languages and cultural references, which is immensely difficult. However, the establishment of a heritage jointly accepted by a culturally diverse society seems to be the only possible action to bind the diversity together. At the same time, this is a great challenge for cross-cultural education and comparative education. It is also the foundation of a processual model for dealing with cultural diversity.

### **Conclusion**

There is no escape from the culture that has created and shaped us. Comparative education, however, creates our dream of a global culture, a transnational culture in which all roads lead to unity and understanding between different cultures. This is unfortunately a utopian thought. For it is not possible to declare unity or understanding, nor is it possible to remove from the memory of nations the difficult memories affecting prejudice against the foreign others, treated in one's social memory as enemies. The only aspect which remains relevant and invariably important is the process of constructing knowledge about other cultures, providing rational arguments for understanding, disenchanting stereotypes by means of knowledge and understanding of distinctiveness, insisting on the priority of recognised and research-proven knowledge over ubiquitous opinions and personal beliefs, avoiding generalisation or, on the contrary, referring to individual educational practice instead of scientific and methodologically grounded exploration. This is, at the same time, the task of comparative education as a scientific sub-discipline, increasingly gaining importance in a culturally diverse world due to the versatility, comprehensiveness and interdisciplinarity of the research conducted by said sub-discipline.

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## **Identity behaviours and perceptions of mixed marriages by young learners from Poland, the Czech Republic, Slovakia and Ukraine - A socio-pedagogical comparative study**

**Abstract:** Pedagogical analysis of the issues addressed in the study adopts theoretical and methodological conceptualisations, referring to Paweł Boski's (1) theory of cultural identity based on values and practices in conditions of bicultural and multicultural socialisation, Tadeusz Lewowicki's (2) theory of identity behaviours, and (3) comparative analysis in international studies. The basis for outlining the sense of identity in local, regional, national, European and extra-European dimensions manifested by academic youth and their perceptions of mixed marriages was an international comparative study conducted from 2019 to 2021 in the Polish-Czech-Slovak-Ukrainian borderland. The analysis and interpretation of the collected empirical material indicate that – although there have been political transformations in the neighbouring countries, they cooperate in many spheres – both traditional ('constant') elements and new phenomena and processes, determined by the complexity and diversity of historical, cultural-social, cultural-personal and economic conditions, are preserved in the image of identity behaviour

manifested by students today. These shape with particular intensity the cultural identity of young learners in the years of early adulthood.

**Keywords:** cultural identity, identity behaviours, mixed marriages, young learners, Polish-Czech-Slovak-Ukrainian cultural borderland, comparative analysis in international studies.

### **Introduction: Who am I? Who are we? Dilemmas of individual identity construction in culturally diverse environments**

The ongoing changes result in (self) formation of the cultural identity, which takes on the character of constructing, arranging its individual fragments to create a complete unit, which the subject carries out in constant reference to and in relation with the Other(s), in confrontation with an increasingly culturally diverse society/societies. Therefore, it is a perpetual, dynamic, contextually variable, largely future-oriented, multidirectional and transnational process. It requires, according to Jerzy Nikitorowicz, a creative effort on the part of the subject, alleviating tensions and contradictions between the constant elements (indigenous, inherited, anchored in the family and local community) and the variable elements – acquired, resulting from interactions and experiences of participation in culture (Nikitorowicz, 2005, p. 60-103).

The functioning of an individual in a multicultural environment involves, voluntarily and/or forcefully, the need for the individual to build a cultural identity in a constructive manner. It can manifest the following types in its horizontal (diachronic – variable) and vertical (layered, overlapping sequentially in connection with each other, mainly on the basis of indigenous values) dimensions:

- ethnocentric (inherited) identity – valuing a foreign, different culture through the prism of indigenous cultural standards (values, lifestyles, personal and cultural patterns) and at the same time affirming one's own regarded as exemplary culture,
- dispersed (multicultural) identity – a result of the confrontation of an inherited identity with a new, changing cultural reality, which leads the individual to acquire an awareness of belonging to a number of socio-cultural groups which exist 'next door',
- integrated (intercultural) identity – a combination of elements of the personal value system of the individual with the values of the culture of group(s) to which he or she belongs and in the lives of which he or she participates consciously and reflectively,

- virtual (culturally disoriented) identity – created most often as a result of an intergenerational split, a lack of (inter)cultural guides and interpreters or generational distance and rivalry (Nikitorowicz, 2009, p. 406-416; Nikitorowicz, 2013, p. 29-49).

The results of existing studies (e.g. Giddens, 2001; Golka, 2012, p. 209-223; Kyuchukov, Lewowicki and Ogrodzka-Mazur, 2015; Paleczny, 2017, p. 63-81; Nikitorowicz, 2018; Lewowicki, Ogrodzka-Mazur, Chojnacka-Synaszko and Klajmon-Lech, 2018) on the problem of the sense of identity manifested by borderland communities indicate that both traditional ('constant') elements, as well as new phenomena and processes, conditioned by the complexity and diversity of the circumstances (historical, cultural-social, cultural-personal and economic-financial ones), which co-determine with a particular intensity the developing identity of the young generation, can be observed in its image today. During early adulthood – as recognised by researchers who study the development of the sense of identity – the majority of the important experiences and those characterised by intense emotions in the life of an individual is related to both his or her self-image and duties. It is precisely the emerging sense of identity that enables the individual to continuously strive to recognise and define himself or herself, and thus to form an individual personal and social identity. The functioning of youth in their family, peer and educational environment, as well as in a broader, diverse cultural setting, becomes the source of their diverse identity experiences – a sense of cohesion, of separateness and continuity.

There has been little research conducted so far in pedagogical studies about the social, cultural and educational functioning of academic youth from selected Central and Eastern European countries in culturally diverse conditions. The current state of knowledge in this respect, presented mainly in the field of comparative pedagogy, mainly amounts to the presentation of expert opinions of the state and situation of higher education in a given country and the applied solutions.

An analysis of the identity behaviours of students from Poland, the Czech Republic, Slovakia and Ukraine provides an opportunity for getting to know each other, mutual understanding and enrichment of our cultures (cultural sensitivity) and facilitates – due to the adopted culturalisation attitudes – participation in the culture of a neighbouring country and reduction of cultural distance. This type of research is also connected with the reflection on how the contemporary person actually understands the dimensions of culture, what role they play in one's life and to what extent they shape the cultural identity of both the individual as well as the society.

### **Theoretical and methodological objectives**

In the pedagogical analysis of the issue concerning identity behaviours and perception of mixed marriages by young learners from Poland, the Czech Republic, Slovakia and Ukraine, I adopted theoretical conceptualisations referring to Paweł Boski's (1) theory of cultural identity based on values and practices in a bicultural and multicultural socialisation. Cultural identity is viewed as 'a relational concept, which is the level of convergence in terms of values between the individual Self and a positive cultural prototype, or between its two aspects – one descriptive for one's own culture and the other evaluative' (Boski, 2009, p. 552; Boski, 2008a, p. 165-205; Boski, 2008b, p. 97-145). A reference to the suggested model in pedagogical analysis implies the possibility of cultural transmission under conditions of intentional learning (e.g. in the family, school/university, group of peers, local environment) as well as experience in the social discourse of a country and constitutes – compared to traditional conceptions of acculturation (Berry, 1994, p. 253-257; Wysocka, 2013, p. 69-96) – the most complex construct, examining integration in its five meanings: integration as a positive assessment of biculturalism; integration as bilingual/bicultural competence; integration as 'functional specialisation'; integration as a new quality being a merger of components; and integration as psychological autonomy in relation to both initial cultures (Boski, 2009, p. 542-547).

The outline (2) of the theory of identity behaviours (pol. teoria zachowań tożsamościowych, TZT) – developed by Tadeusz Lewowicki – has proved to be an important perspective in the search for regularities determining the formation of the sense of identity in changing conditions of cultural diversity, as it enables a holistic, as well as a comparative approach to the processes and phenomena occurring in multicultural environments. The distinctive areas (elements) of identity – the first one – encompassing one's historical background, identification with a particular territory and social group; the second one – determined by the distinctiveness of culture, language, transmission of tradition and knowledge about the spiritual and material heritage of the given community; the third – associated with the peculiar historical genealogy and the specific characteristics of the group(s) and the stereotypes functioning within it/them; the fourth – concerning the economic condition, the living standards of the group(s); the fifth – related to needs, life goals and axiological preferences; and the sixth – considering the context of politics, worldview, society and economy – become at the same time significant determinants of identity behaviours (Lewowicki, 1995a, p. 51-63; Lewowicki 1995b, p. 13-26).

Given the comparative nature of the research, a reference was also made to (3) comparative analysis in international research, entailing the process of selection of study trials in different countries and conducting an analysis of the studied phenomena according to appropriate criteria in order to state the same, similar or different degrees of intensity of the studied characteristics (Szarucki, 2010, p. 55). Moreover, the most essential prerequisites for data comparability were met, namely: conceptual comparability – the measurements refer to the same concepts and categories; statistical comparability – methods of data collection accepted in statistical research were used in every category; and comparability of interpretation – the surveyed categories were interpreted in a similar way in all countries surveyed, but at the same time the conditions in the selected countries were taken into consideration (Kordos, 2007, p. 28).

The main problem addressed in the research of the author is contained in the questions:

- What sense of identity and national identification is manifested by the academic youth from Poland, the Czech Republic, Slovakia and Ukraine studying full-time in the surveyed, culturally diverse environments?
- How do students perceive mixed marriages functioning in their socio-cultural environment?

In accordance with the adopted methodological stance, the research activities carried out used a quantitative-qualitative approach and – based on the research procedures recognised within them – specific research tools. Their selection and/or construction (in the case of self-developed tools) followed simultaneously the theories adopted in the study and the resulting assumptions for the addressed issues.

The comparative research was conducted in 3 stages. Stage I comprised monographic (field) studies intended to explore the inherited and currently formed socio-cultural capital of the Polish-Czech-Slovak-Ukrainian borderland. In Stage II, quantitative research ('surveys'), based on standardised original tools, was carried out. Finally, in Stage III, qualitative research was conducted with the use of ethnographic observation, individual interviews and document analysis to enhance the data obtained on the studied areas.

In the analysis of the empirical material, a reducing and expanding manner of transforming the data was implemented, as well as the assumptions of an interpretation approach to analysis of the meanings of statements were taken into consideration in the context of: understanding the thoughts of the subjects, critical common sense understanding and

theoretical understanding (Kvale, 2004, p. 213-231; Miles and Huberman, 2000; Denzin and Lincoln, 2009). A phenomenological approach was also applied in drawing up a complete description of the occurrences, moving from individual textural-structural narratives of the meanings and essence of the experiences of the individuals in question to a synthesis in the form of a universal description of cultural experiences, representing the group(s) as a whole (Moustakas, 2001, p. 147-149).

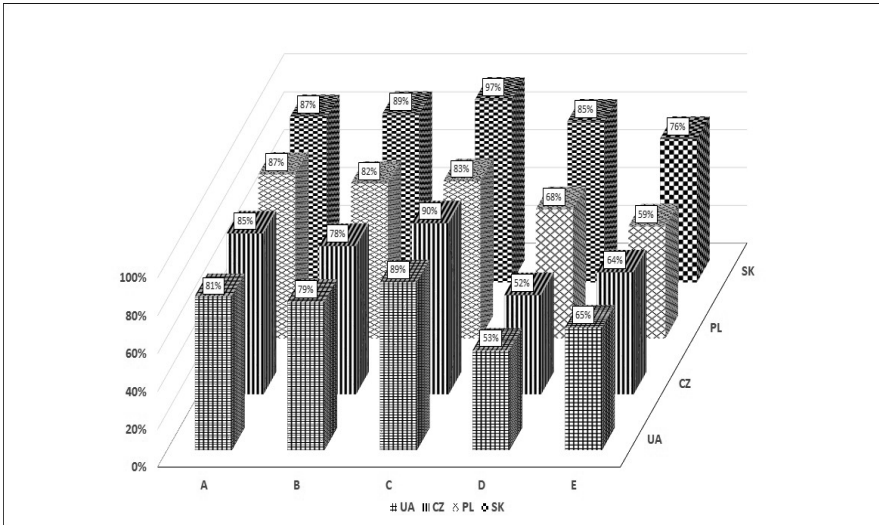
A total of 709 students participated in the research from 2019 to 2021, including 164 in Poland (97% female and 3% male), 166 in the Czech Republic (72.3% female and 27.7% male), 174 in Slovakia (90.8% female and 9.2% male) and 205 in Ukraine (85% female and 15% male). 7% of participants aged 17-18 years (48 people, including 46 in Ukraine), 46% aged 19-22 years (324 people), 27% (193) of participants aged 23-26 years and 20% of students aged 27 years and over (144 people). The study group is representative for pedagogy students, studying full-time at 1st and 2nd degree studies at the University of Silesia in Cieszyn (Poland), the University of Ostrava (Czech Republic), Matej Bel University in Banská Bystrica (Slovakia) and the I. Franko State University in Zhytomyr (Ukraine).

### **Identity behaviours and national identifications expressed by students – towards a multidimensional identity**

The functioning of academic youth in cultural borderlands is connected to a natural feeling of belonging to a specific social group (including, i.a. national or cultural groups) and enables self-identification, which is the basis for the differentiation between I-We and Others-They. The external (the attribution of belonging) and/or internal (self-determination) nature of identification, formed on a number of variously hierarchical levels, simultaneously shapes its sense of identity.

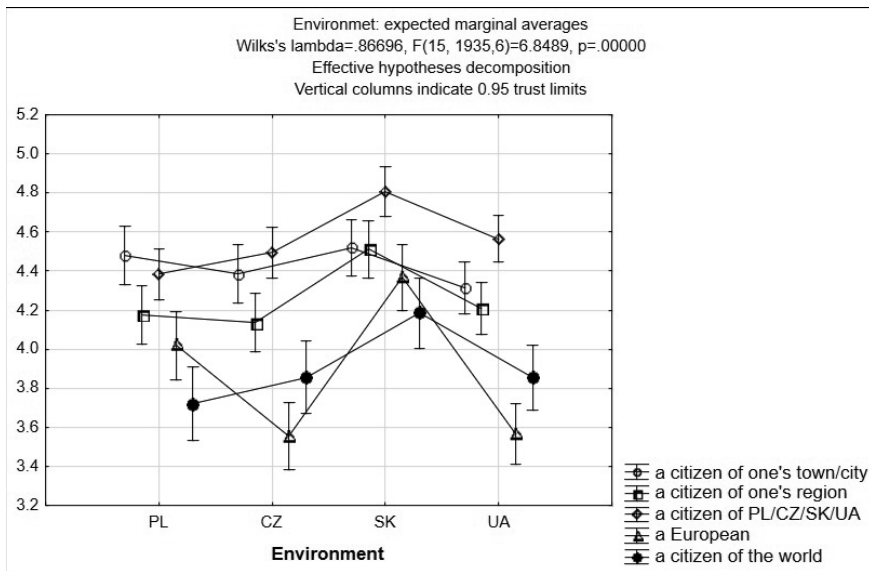
The declarations of the surveyed students (cf. Figure 1) regarding their sense of identity form, on one hand, a similar national (89.8%) – local (85%) – regional (82%) structure. Whereas, conversely – clear differences can be seen in the identification with Europe or the expressed feeling of being a citizen of the world, and this definitely applies to the choices indicated by young learners from Ukraine, Poland and the Czech Republic.

**Figure 1.** Declared sense of identity by students from Poland, the Czech Republic, Slovakia and Ukraine (data in %)



Legend: a – I consider myself a citizen of my town/city; b – I consider myself a citizen of the region; c – I consider myself a citizen of Poland/Czech Republic, Slovakia/Ukraine; d – I consider myself European; e – I consider myself citizen of the world  
 Source: own research

**Figure 2.** Declared sense of identity by students from Poland, the Czech Republic, Slovakia and Ukraine (one-way ANOVA)



Source: own research

A thorough statistical comparative analysis of the study environments (cf. Figure 2) shows both similarities and differences in the sense of identity expressed by the students. A comparison of the declarations confirms the significant differentiation of the overall structure for the answers concerning their sense of connection with the region, their own country, Europe and the world, with a very similar local identification, with their town or city above all.

Academic youth from Slovakia is significantly more likely – compared to their peers from Poland, the Czech Republic and Ukraine – to declare stronger:

- sense of connection to the region (Kruskal-Wallis test:  $H(3, N=709) = 19.74; p = .0002$ ),
- sense of being a citizen of one's country ( $H(3, N=709) = 23.23; p = .00$ ),
- sense of being a European ( $H(3, N=709) = 62.82; p = .00$ ),
- sense of being a citizen of the world ( $H(3, N=709) = 14,41399; p = .0024$ ).

The existing discrepancies in the declared national identifications of individual groups of students point to a current tendency for the young generation to identify with different communities – local and regional ones in their homeland and, more broadly, the European one and beyond. The construction of their own identity by young learners is at the same time a shift from a uniform dimension of identity to the discovery and conscious choice of an enriched, multidimensional identity, determined most often by progressing, to varying rates and degrees, the processes of democratisation of public life. As T. Lewowicki points out, '[...] in such conditions many young people can identify more and more confidently with their country as well as with Europe. There is no need for radical choices, there is a heightened awareness of bonds, communities, and the need to collaborate at different levels and on different scopes of individual, social and transnational as well as above-state problems. The consequence of such is the formation of a multidimensional identity' (Lewowicki, 2009, p. 254-255).

Nevertheless – in the context of analysis of the obtained research results – the strong national identification of young learners from all countries constitutes an indicator of distinctiveness and connection to the national community. National culture is the deepest layer, which internally protects the sovereignty of the individual. Achieving this distinctiveness and autonomy, according to T. Lewowicki's theory of identity behaviours mentioned above, allows communities and individuals to fulfil their own aspirations

and provokes specific social actions of both individual and collective kind. National identification should furthermore be seen as another stage of taking root, which in effect makes it possible to go to the limits of one's own culture with the motivation to be open and discover other cultures. This stage of settling in is carried out on the level of the family and local, as well as regional heritage and proves to be indispensable as the world becomes globalised. The current results and their interpretation have supported the thesis formulated more than two decades ago by a culture sociologist – Antonina Kłoskowska (1996) – who, while focusing on experiencing by an individual of various aspects of his or her social identity, drew attention to the phenomenon of a peculiar nationalisation of social reality – Polish, European or global. Such nationalisation was to be expressed in the greater prominence of national symbolism in the infrastructure of everyday life. Furthermore, it can be presumed that another indifferent experience in the analysed process was – after the Velvet Revolution – the division of Czechoslovakia into the Czech Republic and Slovakia, or the regaining of independence by Ukraine in 1991. In these circumstances, it is understandable to seek the redefinition of national identity in the social consciousness. After many unfavourable experiences the time has come for an unambiguous identification, a noticeable increase in the number of people (especially young) who emphasise their national identity. This phenomenon – the stage of regaining and redefinition of one's identity – is explainable in the sense of mechanisms of social psychology and sociology, and remains in line with, i.a., the theory of identity behaviours (Lewowicki, 2009, p. 255).

### **The perception of mixed marriages**

Marriage is considered to be the central point of family formation and construction. The phenomena connected with globalisation are beneficial not only for cultural cognition, but also for the establishment of close relationships, which can be legally legitimised. Numerous programmes in Poland show foreigners as 'friendly Others', curious about our country, settling in here and starting their families (Szafrńska, 2021). As a result, mixed marriages are nowadays no longer considered surprising and less and less often are met with rejection or stigmatisation. Marriages are entered into observing the rules of the country, in accordance with its customs, religious or legal precepts (Szukalski, 2013).

In Poland, an increase in the number of mixed relationships has been noted since the 1990s. It was the result of opening the borders, the developing process of European integration and the socio-political situation in the

world. There have been an increase of people entering the country for work and tourism, as well as waves of migration of Poles abroad. This progressive ethno-cultural diversification of the population and increased contact with culturally different people has naturally led to the formation of mixed couples and relationships, and – in the context of the conducted research – it is worth noting that these relationships used to generate significant controversy or even resistance in the past (Kasprzycki, 2013). According to the Bogardus' social distance scale, mixed marriages are considered to be a reflection of the greatest social closeness, and many researchers recognise them as one of the best indicators of social integration and cohesion (Brzozowska, 2017, p. 1).

The literature distinguishes mixed marriages in terms of various characteristics of the spouses, such as nationality, different countries of origin, ethnicity, race or religion. In the case of relationships between people of various nationalities or marriages of citizens of different countries, the terms 'binational' or 'cross-border' marriages are used (Rajkiewicz 2009, p. 170). Małgorzata Jodłowska-Herudzińska, on the other hand, applies the term: intercultural mixed marriages. The author emphasises that in such marriages a specific situation emerges – a 'meeting' of partners who represent distinct cultures and decide to get married, i.e. to live together, support each other and raise children (2001, p. 279-289). This 'meeting', i.e. the clash of cultures extensively described in the field of intercultural education, constitutes an important factor in the way mixed marriages function. Marital homogamy refers to the tendency to marry people of similar ethnic origin, nationality, religion, educational level or socio-economic status. The greater the similarity, the greater the homogamy, which is an indicator of cohesion of categories as well as the openness and strength of social barriers (Brzozowska 2015, p. 9). It is presumed that the level of spousal similarity – especially the similarity of cultural characteristics – determines marital satisfaction. Mixed marriages are therefore by default relationships of increased difficulty (Jodłowska-Herudzińska 2002, p. 174).

We were interested in how the surveyed students, representing four countries from Central and Eastern Europe, see the problem of mixed marriages. We posed the question of how mixed marriages are perceived in their environment (cf. Table 1). Overall, a majority of 307 responses (45.4%) indicates a neutral attitude towards this type of relationship. Respondents were significantly more likely to indicate a positive attitude towards mixed marriages, with a total of 284 students (42%) providing such statements. The perception of this type of marriage was viewed negatively by 85 students (12.6%).

**Table 1.** The perception of mixed marriages in the environment of the respondents

	Number of indications	%
Very positive	63	9.3
Positive	221	32.7
Neutral	307	45.4
Negative	68	10.1
Very negative	17	2.5
Total	676	100

N=676

Source: own research

There is a statistically significant correlation of low strength of association between the place of study and the student responses for  $p=0.001 < 0.05$  Cramer's  $V = 0.285$ . Slight discrepancies can be noted in the way mixed marriages are perceived by students from particular countries. Polish respondents most frequently indicated a neutral (39%), positive (36.6%) and very positive (11.6%) opinion. Slightly more than half of Ukrainian students also indicated a neutral opinion (52.4 %) and almost one in three respondents (33 %) a positive one, but it was considerably less common to express a very positive opinion (4.2 %). The highest number of neutral opinions was indicated by students from Slovakia (59.4%), with much less frequent positive opinions (just over 25% in total). However, respondents from the Czech Republic appeared to have the most positive attitude towards mixed marriages – here, positive evaluations dominated – overall more than half of the respondents (with 43.4% indicating a positive attitude and the highest number among all students 13.3% indicating a very positive one). Among Czech students, neutral ratings were marked by just over 30% of respondents.

Within the very negative ratings, almost half are from Ukraine and 1/3 from Poland. However, it should be noted that these responses were rarely marked overall, given by only 17 respondents across all countries. It was marked very negatively by 8 respondents from Ukraine, 5 from Poland and 2 each from the Czech Republic and Slovakia (Table 2).

**Table 2.** The perception of mixed marriages in the respondents' environment categorised by the responses of students studying in Poland, the Czech Republic, Slovakia and Ukraine

Surveyed students from:		Evaluation of mixed marriages perception					In total
		very negatively	negatively	neutrally	positively	very positively	
Poland	Quantity	5	16	64	60	19	164
	Percentage	3%	9.8%	39%	36.6%	11.6%	100%
The Czech Republic	Quantity	2	19	51	72	22	166
	Percentage	1.2%	11.4%	30.7%	43.4%	13.3%	100%
Slovakia	Quantity	2	21	92	26	14	155
	Percentage	1.3%	13.5%	59.4%	16.8%	9.0%	100%
Ukraine	Quantity	8	12	100	63	8	191
	Percentage	4.2%	6.3%	52.4%	33%	4.2%	100%
In total	Quantity	17	68	307	221	63	676
	Percentage	2.5%	10.1%	45.4%	32.7%	9.3%	100%

Source: own research

N of valid observations: 676

$\chi^2=54.950$ ,  $df=12$  for  $p=0.01 < 0.05$

Cramer's  $V=0.285$

## Conclusions

The arguments presented in the study do not provide for a comprehensive image of both the identity behaviours exhibited by young adults studying and living in borderland environments and their perception of mixed marriages. They only serve as an attempt to capture, describe and interpret the characteristic features and trends regarding the matters in question, which at the same time are of significant importance for undertaking specific educational actions in culturally diverse communities.

The sense of identity of the surveyed academic youth in reference to P. Boski's theory of cultural identity based on the values and practices in conditions of bicultural and multicultural socialisation is relational. In this context, there is a possibility of cultural transmission in settings of intentional

learning, such as family, university, peer group or local environment, as well as experience in the social discourse of a country. The existing differences in the declared sense of identity and national identifications of individual student groups point to a current tendency for the young generation to identify with various communities – national (their country of origin), local, regional or, more broadly, European and beyond. The construction of identity of young learners is at the same time a departure from its homogeneous dimension to the discovery and conscious choice of an enriched, multidimensional identity, most often determined by the democratisation processes of social life, progressing at various rates and to different extents.

According to the surveyed students, neutral (indifferent) and positive perceptions of mixed marriages prevail in their environment. With the most positive views being expressed by respondents from the Czech Republic, and the least positive evaluations being reported by students from Slovakia. This difference is particularly intriguing as, until the end of 1992, the citizens of the current Czech Republic and Slovakia lived in the same, single state.

Given that the declarations of the Ukrainian students were collected in 2021, before the Russian aggression against their country – it can be assumed that the current picture of their sense of identity and the chosen identity profiles, as well as the attitude towards mixed marriages, would be different, similarly to the remaining academic youth from the analysed environments. Therefore, it is difficult not to agree with the opinion of Krystyna Szafraniec, according to which ‘the youth is a very good reference point for observing what is happening to society as a whole. It is the lens in which the various problems and tensions of the system are focused. It is a barometer of change and public attitudes. The situation of the young, their perception of the world, their aspirations and life goals are a measure of the changes that had already taken place and the distance yet to be overcome. Diagnoses of the young naturally make us think about the future, they introduce us to the kind of intellectual practice without which it is difficult to imagine practising enlightened and far-sighted policy – they constitute a natural point of reference for predictions’ (2011, p. 11).

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## **Strategies of teachers towards Muslim students in Polish schools**

**Abstract:** Due to over 40 years of seclusion behind the iron curtain (until 1989) and the myth of a single ethnicity, single religion nation, the Polish education system lacks exposure to a multireligious classroom environment. With EU accession in 2004, the situation is gradually changing. Although higher education facilities provide teachers with comprehensive training in this matter, the actual first-hand experience is rare and new. In this paper, we used an exploratory study, based on qualitative data collected in autumn 2022, using an interpretative approach, to identify and describe strategies for the best practices of teachers when working with Muslim students in a Polish classroom. The empirical data was derived from 37 interviews with teachers (25) and with Muslim students (12) covering 5 voivodeships. We aim to provide a valuable source of information for professionals on how to create an inclusive classroom environment. The exploratory study is part of a larger research project that received funding from the EU, titled *EMPATHY: Challenging discourse about Islam and Muslims in Poland, [101049389 CERV-2021-EQUAL]*. In effect, we identified 2 predominant strategies of teachers for engagement with Muslim students and several best practice examples on how to overcome obstacles to classroom inclusion.

**Keywords:** Muslims, Poland, school, students.

## **Introduction**

Muslims are a small and vulnerable group of students in Polish schools. They are also a very diverse group of students: Polish Tatars, Chechens, Iraqis, Afghans and others. These factors make their experiences at school incomparable and therefore hard to study. This diversity is intersectional and includes a number of factors such as nationality, ethnicity, fluency in Polish, religiosity, and being 'visibly' (Tarlo, 2010) or not visibly Muslim. We do not mention the internal diversity of Islam such as Sunni, Shia and smaller fractions, as these are more advanced forms of identification invisible to the Polish majority and the only commonality – religion – might be lived differently (Ammermann, 2016) and only perceived as a difference by their Muslim peers. From this perspective the school experiences and opportunities of a Polish Tatar, whose family has been living in Poland for centuries and an Afghan refugee who recently came to Poland and lives in a refugee centre are incomparable at many different levels.

Despite these internal differences, being a Muslim student in a Polish school is an important factor to investigate. A Muslim might be identified as one by the public regardless of whether Islam constitutes a vital aspect of his or her identity, and whether they are actually willing to be considered as one. Jeldtoft (2016) uses in this context the concept of hypervisibility of Islam, while Rissanen (2018) analysed how Muslims are considered primarily as religious beings. In the Polish context, these distinctions might be even more appealing, since Muslim students and their parents are often the only Muslims ever known by their classmates or teachers, while the monocultural character of Polish schools makes such differences easier to spot (Górak-Sosnowska and Markowska-Manista, 2022). At the same time, with high levels of Islamophobia and the prevalence of anti-Muslim hate speech, Muslim students are vulnerable in school settings, especially since young Poles hold more anti-Islamic prejudices and are more prone to accept Islamophobic hate speech compared to the older population (Stefaniak, 2015, p. 32; Wieniawski et al., 2017).

This article aims to look at strategies used by teachers in Polish schools toward Muslim students in their classrooms. Teachers are required not only to have high professional qualifications, but also appropriate moral attitudes and behaviours, that enable them to shape the relationship between them and their students (Kutrowska, 2008). The need to navigate between external and internal demands (parents vs. system), calls for professionalization (maximizing the academic preparation of teachers for the demands of uncertain social realities), and an ever-changing institutional context,

with the moving of rules and regulations, teaching programmes and books forced upon teachers by politicians, pushing a populist agenda, all go towards making their work environment fragile. In this context, some of them face an additional challenge, to accommodate a student of a unique background in their classroom.

The article begins with data and methodology setting the context for further analysis. In the subsequent parts of the article, we identify two main strategies of teachers for student engagement and a number of best practice examples on how to cope with potential and occurring challenges.

### **Data and methodology**

This paper uses a qualitative study, based on an interpretative paradigm (Denzin and Lincoln, 2011). It has an exploratory character with no pre-hypothesis (cf. Creswell and Poth, 2017). The main method used is a case study of a phenomenon, the preparation of schoolteachers for religiously diverse classrooms (cf. Stake, 1995). The paper is based on 37 semi-structured interviews conducted with teachers (25) and Muslim students (12) in the summer and autumn of 2022. The teachers were purposely chosen from 5 voivodeships representing the North, South, Centre, East, and West of Poland with a mix of city, town and village schools. The majority of teachers (23) were women. The Muslim interlocutors were a diverse group of graduates of Polish schools. We decided to speak with middle school leavers rather than university students, because the latter may have had a consolidated approach to their school experience, combining it with that of higher education, whilst we wanted to focus our attention on compulsory levels of education. As the students and teachers were from different schools, their narratives are not comparative. They are intended to present a multi-dimensional perspective of teacher strategies toward Muslim students. The core narrative is that of the teachers, but it is complemented by how Muslim students perceive the behaviour of their teachers and what they found helpful to them and their process of learning.

All interviews were transcribed and coded in MAXQDA 2022 software for further qualitative analysis. The interviews were analysed according to the indicative approach in thematic analysis, sometimes called a 'bottom-up' approach. Thus, we created themes from our data without any preconceptions and determined the themes from the data. Each of the co-authors coded one set of data, so student and teacher data were coded independently. Subsequently, we compared the themes that emerged from coding, reviewed them

and prepared a final set of codes. This way we formulated two main strategies for teacher engagement with Muslim students.

Before presenting the strategies, the institutional context of Polish schools should be briefly noted. The Polish school is not institutionally adapted to the needs of Muslim students, unlike many schools in the West. It is difficult to talk about halal food in a school canteen (e.g. Giovine, 2014), the systemic consideration of the needs of Muslim women during PE lessons (e.g. Dagkas, Benn and Jawad, 2011), or the existence of Muslim schools (e.g. Zine, 2008). This leaves Muslim students and their parents with limited opportunity to negotiate their needs. At the same time, it also leaves the teachers in an uncomfortable position. They must accommodate a student of a different background, one that is strongly stereotyped, in their classroom and in the school setting. Many of them had no previous experience with Muslim students, or substantial knowledge about their cultural context.

### **Muslim students as cultural brokers**

A strategy indicated most frequently by teachers was that of accommodating Muslim students in the classroom and they approached it in two different ways. Either the student was invited to **share their culture with their class**, or **students' distinctiveness was used as one of many ways of being different**. In both ways, the student became a **cultural broker**. Odrowąż-Coates (2017) writes about the advantages of such situations for the benefit of society and its development.

Teachers and students alike mention instances when Muslim students were invited to present their religion or culture to other classmates. All students mentioned these opportunities as something they enjoyed. Usually, these were short lectures or presentations during history, geography or social science classes. Students were often asked in private if they would like to present something so as not to put them in the position of a 'living cultural laboratory' (Górak-Sosnowska, 2023). In this manner two teachers reported how they invited Muslim students to present their religion:

"I asked Jasmina (with the consent of her parents) to present her faith. It was a lesson devoted to developing children's self-presentation skills, each of the children prepared a presentation on a selected topic, I asked Jasmina to prepare a speech on her faith". [Teacher 13]

“If I have a child who is related to a given culture, I try to let them say something more about it. Who is better to tell us about their culture than a child who comes from it”. [Teacher 18]

Another way of helping Polish students to become familiar with their Muslim peers, was to incorporate their diversity. While discussing their Muslim students, teachers often referred to them as only one of many members of a diverse classroom. Again Teacher 13:

“I strongly emphasize the right of a child to have their own religion and the issue of tolerance. Of course, not only in the subject of religion. After all, there are children with other problems, with disabilities (there is a boy with autism among my pupils), obesity, etc. I show in my class that we differ in many areas of appearance, difficulties and of course, in terms of cultural background and religion.”

In a similar manner, Teacher 21 presented a case of an Afghan student:

“This Afghan boy in my class stays in the classroom to pray during breaks. If there is a question why he stays I say: ‘because he wants to pray’ and it is received without much reflection or interest. He just stays in the classroom. I don’t see any problems here; it is accepted naturally”.

Creating such a friendly environment necessitates not only methodical skills, but also high self-awareness and caution in navigating the classroom. Sometimes the differences are acknowledged within the classroom. This was the case of Muslim and non-Muslim students who gradually came to know each other; the non-Muslim students invited the Muslim ones to taste some sweets, and Muslim students had to check whether there was pork gelatine in gummies, but at the end, there was fun and mutual learning.

Some situations were particularly hard to navigate. That was the case of St. Nicholas Day celebrations and traditional gift exchanges. Teacher 4 described her preparations for that day. She has two Muslim students in her classroom. Their parents told the teacher that children can only participate in national holidays, not religious ones. Yet, sometimes these students come to the class for celebrations. That is why the teachers always have emergency gifts – in case Muslim students decide to join the classroom.

### **Support to Muslim students**

In some cases, teachers decided to provide extra support to Muslim students to facilitate their participation in class. This strategy is usually employed in three different types of situations.

The first one does not have that much to do with a student's religious background, but with their legal status in Poland. Some schools accommodate Muslim students who have recently arrived in Poland as refugees. Sometimes it is just one student, or children from one family, and in some cases, there is a more numerous group of students from a nearby refugee centre. Our respondents shared their stories of incorporating Muslim students into their classrooms during the school year. They often had limited knowledge of Polish, sometimes also limited knowledge of English (Młynarczuk-Sokołowska and Szostak-Król, 2016), and were possibly traumatized by the events that led to them being in Poland. One of the teachers said bluntly that she “was simply not prepared to teach such children” [T3]. She had a Chechen girl in her class, who only passively participated in the class, by sitting in the classroom and looking around. She did not have any notebook and during tests, she only gave back empty examination sheets. The teacher talked with her mother and school counsellor, but without much success. The student left school. The teacher has no idea what has happened to her afterwards. Teacher 4 shared a similar story of a group of Afghan students. The students were smiling and never caused any problems, but contact with them was severely limited due to the language barrier. An additional challenge proved to be their legal status. Teacher 4 mentioned that “the problem was more that they came here for a short-term ‘detention’ with the thought that they would leave our country to the West anyway, so it was all temporary” [T4]. Both teachers indicated that they received no institutional support and were basically left on their own. Some teachers were offered dedicated training, but only in one case a teacher mentioned that there was institutional collaboration between the school and the local refugee centre [T5].

The second type of situation when teachers took proactive stance was about fulfilling the religious needs of Muslim students and helping them to navigate a non-Muslim school environment. That was the case of a primary school student who was supported by his teacher [T7] in the school canteen. The teacher advised him whether the dish contains pork, or not. A similar case was mentioned by Teacher 12:

“The Polish kids didn’t pick it up when choosing lunch, but an Algerian boy was so afraid to accidentally eat pork or non-halal meat, that he always opted for a vegetarian option. There could be no meat for him, so when the school canteen served lunch for our Algerian boy, if they had a cutlet, he must have had something else, like a rice dish instead, but only we – the adults knew. Kids did not pick on it, so they also did not know or question the reason.”

Such support was mentioned usually in the context of a school canteen. No similar cases were reported for PE or holiday celebrations.

The third type of situation was that of discriminatory practices against Muslim students. Interestingly, the interviewed teachers only mentioned this issue once [T25], but in several cases it was mentioned by Muslim students. However, they emphasized that they were sure that in case of problems, the teachers would be on their side. Sometimes support was provided by individual teachers or school staff. One student [S10] recalls that the person who yelled at a student who made fun of her was a janitor. From then on, the oppressive student stopped making fun of her. Another two respondents underlined the generally positive and inclusive atmosphere at the school, which allowed different students (not only Muslims) to be different. One of the teachers [T25] after events that fuelled public opinion negatively [the terrorist attacks on the World Trade Centre and in Bieslan, Russia], prepared leaflets and organized small group discussions to deflate negative discourse and anxiety. Her Muslim students told her later that it was very helpful to face the issues, make it personal, and work through it, rather than making the topic taboo. At the end of this process, Polish students were offering support to their Muslim peers if challenged by other students, so the strategy to get the elephant in the room identified, and then deal with it worked.

## **Conclusion**

Without a doubt, teaching and learning in a multicultural, multifaith classroom is an enriching experience for all participants in the educational process, but there are also several challenges, which may be addressed using the experiences of our interlocutors.

The two main strategies used by teachers involved the Muslim student being a cultural broker and either 1) sharing their culture with the majority [increasing cultural awareness] or 2) using their religious distinctiveness as just one possible ‘flavour’ of diversity [building on distinction]. Best practice involved supporting religious needs, ensuring space for prayer, and dietary requirements, (unfortunately neglecting sport and clothing issues in our

participant group), and publicly addressing curiosity, anxiety, or reluctance through information sharing and open discussions. Both teachers and students found some areas for improvement in the situations relating to religious festivals. Awareness is a head start.

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## The condition of teachers in a comparative perspective

**Abstract:** The article presents the situation of lower secondary education teachers in Europe on the basis of international comparative analyses. The main symptoms of the crisis in the teaching profession were outlined. The professional burnout among Polish teachers was indicated emphasising the growing social requirements for this professional group. The diagnosis of the condition of teachers was made on the basis of data contained in the report of the European Commission *Teachers in Europe* (2021). Several significant aspects of the work life of lower secondary school teachers were highlighted, such as the shortage of teachers in schools, the ageing of this professional group, the outflow of teachers from the profession, as well as working conditions. The conclusions of the analyses highlight the need to increase the attractiveness of the teaching profession to young people.

**Keywords:** teachers, crisis in the teaching profession, the situation of teachers in Europe, teachers' working conditions.

### Introduction

The situation of teachers in the third decade of the 21st century appears as extremely difficult and complex. The demands on the person of the teacher are changing, the tasks facing them are evolving, social expectations of their role are increasing. The teacher is seen today as a counsellor, a guide, a mentor, an interpreter of the world, a consultant, a creator of a community of learners, and the scope of his or her responsibilities is constantly expanding. These new tasks are the result of not only societal changes, but also of actions taken by educational administrations in European Union countries (European Commission, 2009). A teacher is therefore obliged to

continuously broaden and deepen their professional competence, understood as a cognitive structure consisting of skills, knowledge, dispositions and attitudes necessary for the effective implementation of tasks resulting from a specific educational vision. Becoming a teacher is a lifelong, continuous and creative process (Szempruch, 2013). The teacher must be close to the community of students, must give them sufficient time to tackle problems, discuss, experiment, explore and evaluate.

### **The crisis of the teaching profession**

The teacher's responsibilities described in the pedeutological literature (e.g. Banach, 2005; Kwiatkowska, 2008; Průcha, 2006; Szempruch, 2013; Madalińska-Michalak, 2021), the new challenges ahead and the social expectations inspire us to ask about the real condition of contemporary teacher, about the possibilities of coping with the tasks posed to him or her by the modern society. The analysis of the results of research conducted for many years on the professional situation of teachers in Poland shows they experience stress and professional burnout (Kwieciński, 1992; Krawulska-Ptaszyńska, 1996; Nalaskowski, 1997; Golińska and Świętochowski, 1998; Kliś and Kossewska, 1998; Sęk, 2000; Sekułowicz, 2002; Palak, 2007; Tucholska, 2009; Kocór, 2010; Kirenko and Zubrzycka-Maciąg, 2011; Błaszczak and Rowicka, 2019). It manifests itself in emotional exhaustion, a sense of depersonalisation, lack of motivation to act, disbelief in one's own professional competence and a decrease in professional activity. The professional burnout syndrome is determined by a number of factors, including the attribution of the feeling of control, personality type, level of self esteem, beliefs about one's own profession, or certain traits of character.

Professional burnout and stress are most often experienced by extrinsic teachers (Krawulska-Ptaszyńska, 1996), neurotic and introverted teachers, experiencing a sense of loneliness, isolating themselves from society and convinced of being misunderstood by other people (Kliś and Kossewska, 1998), highly reactive teachers (Golińska and Świętochowski, 1998), and those with low self-esteem (Sekułowicz, 2002). Teachers who manifest unrealistic and irrational professional beliefs, who idealise the profession (Tucholska, 2009), and who are dissatisfied with their jobs (Palak, 2007) are vulnerable to this syndrome. The results of the study of teachers' preferences for creative life orientations versus conservative ones also confirm some of the indicated tendencies. Indeed, preferences for creative life orientations of the surveyed teachers coexist with a sense of job satisfaction and job commitment, while

preferences for the conservative type of orientation are fostering professional burnout (Cudowska, 2009).

However, the crisis in the teaching profession does not only affect our country; in recent years, the problem has been growing wider and wider and calls for looking on the condition of the contemporary teacher in the light of international comparative studies. Teachers play a fundamental role in the learning process. The pandemic, the rapid shift from face-to-face to distance learning, has further accentuated their vital contribution to society. It is the responsibility of teachers to facilitate learners' acquisition of key competences, strengthen their civic engagement, transmit human values and support their personal development. Based on data from the European Commission's international report, *Teachers in Europe* (2021), the results of an analysis of several significant aspects of the working life of lower secondary education teachers (ISCED 2 in the levels and fields of International Standard Classification of Education) are presented, including teacher shortages in schools, ageing of this professional group, outflow of teachers from the profession, and working conditions, including hiring methods, responsibilities, working hours, salaries and career opportunities.

### **Shortages of teachers**

The quality of the teachers' work is one of the vital factors determining the success of the education system, although obviously not the only one. This makes the crisis in this profession, which has been observed for several years, all the more worrying. There are fewer and fewer people willing to train for the profession and an increasing number of graduates of teaching courses who fail to take up jobs in schools. In many European countries, staff shortages in schools are hampering the curriculum. One of the many reasons for the decreasing attractiveness of the teaching profession is the decline of its status in the society. At the same time, social, demographic, cultural, economic, scientific, environmental and technological changes are constantly raising the demands, responsibilities and expectations of teachers (European Commission, 2019; Council conclusions of 26 May 2020). In some countries, the shortage of professionals is compounded by their uneven distribution across subjects and geographical areas, ageing population of teachers, as well as low enrolment rates in initial teacher education (ITE Initial Teacher Education), as well as high outflow rates of teachers from the profession (Eurydice, 2021, p. 29-30).

Teacher shortages have persisted for many years, but the problem has recently worsened in Albania, Austria, Belgium, Bulgaria, Croatia, the

Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Liechtenstein, Luxembourg, Macedonia, Montenegro, the Netherlands, Norway, Poland, Portugal, Romania, Serbia, Spain, Sweden, Switzerland, the United Kingdom, as well as Iceland, Lithuania and Latvia. In many education systems, there are shortages of teaching staff in specific disciplines, such as, for example, mathematics, foreign languages, technical education, engineering, as well as in specific geographical areas due to their remoteness, the socio-economic disadvantages of certain rural areas, high cost of living in cities or the conflicting nature of the social environment (Eurydice, 2021, p. 30).

In some countries, such as Cyprus, Northern Ireland and Turkey, the problem contrary to shortage is on the rise, meaning an oversupply of teachers, more qualified teachers compared than available jobs (Eurydice 2021, p. 31). Although teacher shortage and teacher oversupply seem to be contradictory, they do coexist in Greece, Spain, Liechtenstein, Montenegro and Serbia, in Portugal, as well as in Lithuania and Italy. Only Bosnia and Herzegovina, Finland, Malta, Slovenia and Slovakia report no problems in this area (p. 31). In Finland, teacher education is held in high regard, there is a belief in its high quality and teaching is perceived as a job valuable for society. However, even there, the attractiveness of teacher education has been declining in recent years due to deteriorating working conditions for teachers (Eurydice 2021, p. 32).

### **Ageing and outflow of teachers from the profession**

Another problem with which most European Union countries are confronted is the ageing of the teaching workforce. Almost 40% of lower secondary education teachers are at least 50 years old, and only less than 20% are under the age of 35. In Estonia, Greece, Italy, and Lithuania and Latvia, more than half of secondary school teachers will retire within the next 15 years. Similarly, in Austria, Bulgaria, Germany, Portugal and Hungary, between 40% and 50% of teachers will retire in the next dozen or so years. The shortage and ageing population of teachers is a particular challenge for the recruitment of candidates to the profession and, combined with the oversupply, points to inadequacies in staff renewal mechanisms. Some countries are taking measures to allow teachers to take early retirement, as for example in Northern Ireland. In Greece, Spain, Liechtenstein, Portugal, Italy and Lithuania, the problem of an ageing teacher population coexists with the issue of teacher shortage and oversupply in this professional group.

With the exception of Liechtenstein, all these countries are also characterised by a low percentage of young teachers, less than 12% (Eurydice, 2021, p. 32).

A significant challenge for the education policy of most European Union countries is the teachers leaving the profession, particularly in the case of beginners. Often working in disadvantaged socio-economic circumstances, in difficult environments, in institutions with a high proportion of immigrants, turns out to exceed their capabilities. The problem of teacher outflow is particularly acute in the education systems of Belgium, Bulgaria, Denmark, England, Estonia, Hungary, Iceland, Liechtenstein, Sweden, especially as it is combined with teacher shortages and/or ageing (Eurydice, 2021, p. 34).

Recruitment to the profession, i.e. recruitment to initial teacher education (ITE), is also a growing concern. In Belgium, Denmark, Estonia, France, Germany, Hungary, Luxembourg, the Netherlands, Norway, Portugal, Serbia, Sweden, the United Kingdom (England and Scotland), and Iceland, Lithuania, Latvia, Malta, there occur shortages of candidates for teacher education courses. This is often linked to the ageing of teachers and shortages in the given population, therefore, in some countries alternative routes to obtain a teaching qualification are being developed, and flexible ITE courses are also offered. Among all the education systems analysed in the report, only Finland and Bosnia and Herzegovina do not have any problems recruiting people willing to study to become teachers and retaining in-service teachers in school (Eurydice, 2021, p. 34).

### **Methods of employing teachers**

International analyses suggest the problems identified may be the result of the low status of the teaching profession and unsatisfactory working conditions related to contracts, working hours, salaries and retirement age. Qualified teachers in Europe have three types of employment contracts, with varying degrees of security and employment status. Teachers can be employees subject to general labour law, as is the case in Bulgaria, the Czech Republic, Denmark, Estonia, the Netherlands, Ireland, Romania, Serbia, Sweden and the UK, as well as in Lithuania and Latvia. Another form is the employment of teachers under public sector labour laws, but not as civil servants, as is the case in Albania, Austria, Bosnia and Herzegovina, Croatia, Montenegro, North Macedonia, Norway, Poland, Switzerland, Italy, as well as Iceland and Slovakia. Finally, teachers may have the status of civil servants, in which case they are employed in accordance with separate legislation related to public administration and this usually entails greater job security.

This is the case in Belgium, Finland, France, Germany, Greece, Hungary, Liechtenstein, Portugal, Slovenia and Turkey, as well as in Cyprus, Malta and Spain. A slightly different solution has been adopted in Luxembourg, where the employment status varies according to the type of school or the nationality of the teacher, making it possible to employ non-EU teachers in international public schools.

Typically, teachers are employed on contracts for an indefinite period, but in some countries new teachers are employed on temporary contracts during their trial period or for several years while beginning their career, as is the case, for example, in Austria (Eurydice, 2021, p. 35). In the EU Member States, more than 80 % of teachers are employed on a contract for an indefinite period. However, across Europe, almost one in five teachers is employed on a short-term contract. In Austria, Spain, Portugal, Romania, as well as in the French Community of Belgium and in Italy, more than 25% of lower secondary education teachers work on short-term contracts for a specified period (Eurydice, 2021, p. 36). Mostly young teachers, under the age of 35, are employed on contracts for a specified period. In Italy and Portugal, as well as in Spain and Austria, around 80% of teachers under 35 are employed on contracts for a specified period. In Finland, Romania, Cyprus and the French Community of Belgium, more than 50% of young teachers are on short-term contracts. Although the share of contracts for specified period tends to decrease with the age of teachers, in some countries it is high even in the 35-49 age group, which is the case in Spain (39%), Portugal (41%) and Italy (32%) (Eurydice, 2021, p. 37).

### **Responsibilities and working hours of teachers**

The deteriorating professional situation of teachers is also the result of being burdened with numerous responsibilities related to administration, organisation, planning, student assessment, extra-curricular activities, continuous professional development courses, relations with parents and other concerned individuals. These leave little room for proper teaching and concern for its quality. The Teaching and Learning International Survey TALIS 2018 and data from Eurydice show that teachers in EU countries spend up to 47% of their working time on teaching, while 25% is spent on planning, preparing lessons and correcting students' work. The remaining 25% is devoted to other activities, such as student counselling, professional development and communication with parents and carers. There are, of course, differences in the distribution of time between tasks in different countries, but the trend indicated here is nevertheless rather common (Eurydice, 2021, p. 40).

Authorities at the highest level regulate teachers' total workload in most education systems in Europe, but there are differences between countries in defining teachers' working time. In Belgium, Ireland, Turkey and Italy, education authorities only regulate teaching load, while in Albania, Denmark and Estonia, teaching time is not defined at all and teachers' working hours are only included in terms of total working time. On the other hand, in the UK, teachers' working time is the time they are available at school, while in Latvia and Sweden, both forms are combined and it is both the total working time of the teacher and the time they are available at school. However, in most education systems, namely Austria, Bosnia and Herzegovina, Croatia, the Czech Republic, France, the Netherlands, Liechtenstein, Lithuania, North Macedonia, Germany, Poland, Romania, Serbia, Slovakia, Slovenia and Switzerland, the workload of lower secondary education teachers is defined in terms of both teaching time and total working time. Meanwhile, in Bulgaria, Finland, Cyprus and Malta, the workload includes both teaching time and hours of availability at school (Eurydice 2021, p. 40). In Montenegro, Greece, Spain, Luxembourg, Norway, Portugal, Scotland, Iceland and Hungary, the teacher's workload comprises the three elements, i.e. teaching load, total working time, and teacher availability at school (Eurydice 2021, p. 41). In most of the countries surveyed, the total working time for teachers is 40 hours per week (Eurydice, 2021, p. 42).

### **Salary and retirement age for teachers**

The authorities of the European Union assign great importance to support for teachers in coping with increasing demands at work, administrative tasks, participation in institutional leadership, learning assistance, planning, peer collaboration and professional development. In this context, the need to invest in teachers is emphasised, including adequate salaries, which are considered essential for improving the quality of teaching staff and by extension the quality of education (European Commission, 2019, p. 40). However, teachers often earn less than other workers with a university degree. Overall at EU level, only 37.8% of teachers are satisfied with their salary. With large discrepancies between countries: only less than one teacher in ten expresses satisfaction with their salary in Iceland and Portugal, while in Austria and the Flemish Community of Belgium almost 70% of teachers declare satisfaction with their salary (Eurydice, 2021, p. 45).

There are also significant differences in teacher salaries between Eastern European countries and the rest of Europe. Teachers in Montenegro, Poland, Romania, Serbia, Lithuania, Slovakia and Hungary earn the least. In

contrast, teachers in Austria, Denmark, Finland, the Netherlands, Ireland, Germany, Norway and Iceland receive the highest salaries in Europe. Comparing teachers' salaries with gross domestic product per inhabitant (GDP per capita) provides an even more accurate diagnosis of teachers' earnings. The percentage variation between the average annual effective gross income of teachers and GDP per capita varies considerably between countries. In the Netherlands, for example, the average salary is almost 25% higher than GDP per capita, while in the Czech Republic it is almost 25% lower. With the exception of Slovenia and Romania, in all Eastern European countries teachers' salaries are below GDP per capita (Eurydice, 2021, p. 46). In almost all countries in which average effective incomes are below GDP per capita, teachers express less satisfaction with their salaries. This is the case in the Czech Republic, Iceland, Lithuania, Latvia, Slovakia, Sweden and Hungary. The exception is Norway, as the average effective income of teachers is below GDP per capita, while the percentage of teachers satisfied with their income is higher than the figure for the European Union. The high revenues of oil companies probably overstate GDP per capita thus providing explanation of the negative gap between salaries and GDP. Indeed, in Norway, teachers' salaries are among the highest in Europe and have continued to increase over the past decade, especially for teachers with higher qualifications and/or longer experience (Eurydice, 2021, p. 47).

With earnings being undoubtedly one of the strongest motivators of job satisfaction, other factors are nevertheless still relevant, for example, retirement age, which is a part of teachers' working conditions. Currently, in the majority of European education systems (16), namely Belgium, Bosnia and Herzegovina, Croatia, Cyprus, Estonia, Finland, Spain, Liechtenstein, Luxembourg, Romania, Slovenia, Sweden, Scotland and Turkey, the official retirement age of 65 years old is the same for men and women. In the next 13 systems, in Montenegro, Denmark, Greece, the Netherlands, Ireland, Iceland, Norway, Germany, Portugal, Italy, and the United Kingdom (England, North Wales, Ireland), the official retirement age is higher, ranging between 66 and 70 years of age. In contrast, in Bulgaria, the Czech Republic, France, Lithuania, Latvia, Malta, North Macedonia, Slovakia and Hungary, the official retirement age is lower for both men and women, placing between 60 and 64. Meanwhile, in 9 education systems, in Albania, Austria, Bulgaria, the Czech Republic, Lithuania, North Macedonia, Poland, Serbia, Switzerland, women retire earlier than men, although sometimes the difference does not exceed one year, as is the case in the Czech Republic, Lithuania and Switzerland (Eurydice, 2021, p. 48). In a number of countries, the retirement age is

planned to be raised within the next few years or so, most commonly to 65 in Austria, the Czech Republic, Malta, Serbia, and to 68 in Ireland. There will also be a gradual reduction of the gender gap in the Czech Republic and Serbia, from five years to just one and two years, while in Romania and Slovenia it will disappear completely (Eurydice, 2021, p. 50).

### **Career opportunities**

Career opportunities in the teaching profession constitute a significant motivating factor for choosing it and not quitting. A dynamic career path may contribute to making the profession more attractive to young people. Therefore, the Council of Europe and the European Commission encourage Member States to develop national career frameworks for teachers (Eurydice, 2021, p. 50). In the international analyses, only career paths involving the maintenance of teaching responsibilities were included, and promotion to a managerial or administrative position that does not include teaching hours was excluded. Career structure is defined as a recognised path of progression within a job or profession and can be multi-level in nature, defined by a set of competencies, responsibilities, roles and/or hierarchical relationships. The different stages of a career are then structured in terms of increasing complexity and greater responsibility, to which the salary scale may be linked, but it does not constitute its defining feature. In contrast, single-level career structures allow teachers to broaden their experience or take on additional tasks, but are not structured into specific career stages and do not usually involve a change in formal hierarchical relationships between teachers (Eurydice, 2021, p. 51).

24 European education systems have multi-level career structures, while 18 have single-level structures. In multi-level career structures, progression means promotion to the next career level, while in single-level systems progression is tied to increases of salaries. Various education systems differ in the criteria considered for teachers' career progression, but seniority, professional development and teacher evaluation are usually of key importance (Eurydice, 2021, p. 51). These three elements are collectively taken into account in Croatia, Cyprus, France, Hungary, Lithuania, Romania, Serbia and Slovenia. However, in most countries, either seniority or professional development is being considered. In education systems with single-level career structures, years of service are the basis for promotion, with the exception of Liechtenstein, where the age of teachers is accounted for. Continuing professional development is a condition for salary increases only in Spain, Luxembourg and Portugal; in addition, in Liechtenstein and Portugal,

teacher performance evaluation is also factored in (Eurydice, 2021, p. 52). Career development within a multi-level career system mostly translates to higher salaries and increased personal prestige as well as, in many cases, the opportunity to serve in different roles within the school. In some countries, career development is expressed with teachers taking on leadership roles, as in Cyprus, Malta, Ireland and the United Kingdom (Scotland). In other countries, as a part of career development, it is possible for teachers to step into the role of teacher mentors and pedagogical advisors, which involves responsibility for curriculum and coordination of pedagogical knowledge. Teachers can progress through the career ladder and become master teachers, certified teachers, experts or senior teachers. In France, for example, one career step is *professeur formateur academique* with specific responsibilities for training other teachers. The possibility to take on leadership roles, mentor and pedagogical advisor roles, to obtain successive degrees of promotion and also the title of school professor also characterises the multi-level structure of teachers' careers in Poland (Eurydice, 2021, p. 54). Promotion to a higher level in the career structure is associated with an increase in remuneration in all countries with a multi-level career structure (Eurydice, 2021, p. 55).

Teachers work can also vary at school in systems with a single-level career structure. These refer to three areas: teacher and student support (i.e. mentor, teacher trainer and coach); school support (i.e. roles coordinating professional development, subject or curriculum), and leadership roles. Different countries with a single-level career structure provide for different forms of compensated time and/or money for these additional roles. In some countries this is regulated by government decision, in others – schools are autonomous in this regard. A detailed analysis of career options in the teaching profession shows that even in single-level career structures, teachers have many opportunities to diversify their work, take on additional roles and new tasks (Eurydice, 2021, p. 60).

## **Conclusions**

International comparative analyses emphasise the need to enhance the attractiveness of the teaching profession to young people, as the increasing demands on the representatives of this profession are not matched by satisfactory remuneration, career opportunities and general working conditions. It seems that the crisis of the teaching profession which we have been facing for some time is the result of many years of neglect, underinvestment in this sphere of budgetary activity and lack of support for this professional group. Socio-cultural changes have also contributed to the depreciation of

humanistic values and the axiological-moral sphere of life, as well as the diminished role of teaching in favour of learning. The spread of the Internet seems to have given rise to the essentially illusory belief that anyone can obtain information, which is often, wrongly, equated with knowledge. The crisis in the teaching profession, reflected in the negative selection for the profession, the insufficient number of young people willing to study to become teachers, the abandonment of jobs at school and the shortage of teachers, is affecting individual countries to varying degrees, but all European countries are facing it to a greater or lesser extent. Definite actions on the part of the authorities and new educational policy solutions are therefore needed to improve the situation and minimise the effects of the crisis, which could have very serious consequences for the public sphere and the functioning of European societies in the next decades of the 21st century.

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## **Internationalisation of higher education in China – pedagogical analysis of historical development and political context**

**Abstract:** The article concerns the development of internationalisation of higher education in China. The paper describes the historical development of higher education and the development of internationalisation of higher education, recalling the most important facts. The author points out that the first forms of internationalisation took the shape of student and scientific exchanges, and over time, along with the introduction of the country's economic development strategy, the country focused on creating strategic mergers, alliances and international cooperation, which are regulated directly by the PRC (e.g. OBOR) or are transnational (e.g. BRICS), where the Chinese state plays one of the main roles. The article is based on the analysis of existing research by the Chinese researchers, where the analytical perspective of a researcher from a different culture, participating in the process of internationalisation of higher education in the world, is presented.

**Keywords:** comparative education, internationalisation of education, China, internationalisation of higher education in China, higher education.

### **Introduction**

Internationalisation as a concept and strategic agenda is a relatively new, broad and diverse phenomenon in higher education, driven by a dynamic combination of political, economic, socio-cultural and academic contexts. Over the past five decades, the internationalisation of higher education has evolved from being a marginal activity to a key aspect of the

reform agendas in many countries. In the last decade of the previous century, increasing globalisation, regionalisation of economies and societies, combined with the demands of the knowledge based economy have contributed to a more strategic approach to internationalisation at the level of higher education.

Research on the internationalisation of higher education is usually conducted from several perspectives. An analysis of the literature has shown that authors describe the development of internationalisation in a country in two main ways – they analyse political and governmental solutions (Hu and Willis, 2017, p. 245-261; Mok and Han, 2016, p. 19-39) or practical implications in university structures (Wang, 2016, p. 223-242; Wilson-Mah and Thomlinson, 2018, p. 635-648; Kwiek, 2021, p. 1-77; Domański, 2021; Kacperczyk and Górak-Sosnowska, 2020).

The internationalisation of higher education encompasses various forms of international cooperation, such as academic mobility of students or lecturers; mobility of educational programmes and institutional mobility; development of new international academic standards and programmes; integration of international dimensions and educational standards in curricula; institutional partnerships; creation of strategic educational associations (Domański, 2021; Kacperczyk and Górak-Sosnowska, 2020). In the case of China, it takes on Chinese local political, cultural and economic conditions.

Under the influence of economic globalisation, educational services in China, as well as their purpose have been changing similarly to other countries. In a short period of time, higher education has unfortunately become a significant commodity in the global trading system. Meanwhile, the dominant force behind the internationalisation of higher education has transformed, from cultural and political influences, progressively shifting to a market economy oriented towards economic profit.

For many years, the internationalisation of higher education in various countries has mainly involved two aspects. The first was the exchange and cooperation between teaching personnel and academic research, and the second was the mutual transfer between different levels of universities and education, e.g. providing collaborative education between countries, setting up foreign trade schools, conducting international exchange of credit points and other educational services. Nowadays, trends and trajectories of the worldwide internationalisation of education have changed, and economic reasons have become more dominant.

The second aspect of globally developing internationalisation concerns the participation of foreign international agencies in shaping local education

policies. Eugenia Potulicka (2019) highlights that the reach of international organisations which influence higher education is expanding worldwide at a very fast pace. To promote the rapid development of the transnational higher education service sector, these organisations play an increasingly important role in planning internationalisation strategies. First and foremost, it is worth pointing to local European Union (EU) programmes and others related to the Bologna processes. The World Trade Organisation, UNESCO and the Organisation for Economic Co-operation and Development are also actively involved in these processes and are intentionally promoting the development of transnational higher education with a particular direction and purpose.

This article provides an introduction to the subject of internationalisation of higher education in China. Its purpose is to present a history of the development of higher education, discuss how internationalisation has evolved in China and what are the main forces and policy trends shaping the internationalisation of higher education there. The article is important for several reasons. Firstly, it provides an understanding of how China has opened up to internationalisation processes and what political trends are evident in the development of such processes. Secondly, the analysis of solutions undertaken to internationalise education uncovers the kind of educational cooperation and expansion China is planning and engaging in. Understanding the educational trends and policies is important, as Polish universities are increasingly engaging in cooperation with Chinese counterparts. The article falls within the framework of comparative education, a section of pedagogy providing insights into the development of contemporary education systems around the world. It was written by an author from the Eastern European cultural circle who interpreted the phenomenon using available international research (secondary analysis of the already existing studies), including Chinese studies, as well as her personal research experience. The article is partially the outcome of an international project to analyse and interpret the processes of internationalisation of education in countries along the New Silk Road and China<sup>1</sup>.

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<sup>1</sup> Project title: “一带一路”沿线八国国际教育合作与交流政策研究 (*The International Cooperation and Exchange Policy for Education in Belt and Road Countries*); participation in an international grant awarded by the Ministry of Education of the People's Republic of China, 2016-01-01 to 2020-12-30.

## **History of the development of higher education in China**

Higher education in China has a rich tradition and, at the same time, sets an example of progressive solutions for modern times. The traditions of higher education in China date back to the Tang Dynasty, that is the years 618-907, when the prototypes of university education were established (Cai and Yan, 2017, p. 169-193). However, from the point of view of internationalisation, the contemporary history of the development of higher education is more relevant, therefore the remainder of the article will refer to the current times, referring to the most crucial events in the history of the development of higher education.

The first essential fact for understanding the issue of higher education and the processes of internationalisation of education is the period of formation of the People's Republic of China. In 1949, there was a strong and significant influence of the Soviet model, characterised by central planning. It involved governmental allocation of resources, appointing the leaders of institutions of higher learning, allocating jobs to graduates or determining the number of students recruited to particular institutions. Another example of inspiration from foreign models, in this case Soviet one, was the lack of private institutions of higher education, as well as religious universities in China, until the 1960s. (Mańkowska, 2021).

The second significant fact, indicating that China can draw inspiration from abroad, but prioritises compliance with local political ideologies, is the period of the Cultural Revolution, when the government seized all authority in education and the higher education rigorously adhered to the unified requirements of the government. It was a highly centralised type of education system, with a high degree of state interference in teaching. At that time, higher education was practised exclusively in the national interest and constituted a national monopoly. Funding for higher education was very limited and developed slowly over a long period of time. University education was free of charge.

The 90s were a time when China began to build a socialist market economy, introducing profound changes in the social structure. The national concept and social logic underwent a process of transformation – from authority-dominated education to focus towards marketisation. Privately-funded universities began to reappear (Mańkowska, 2014, p. 127-137) and students were given the right to choose a university according to their purchasing power (although those schools were still subject to many restrictions), indicating a partial trend of commodification of higher education in China. Since

the 90s, tuition at higher education levels has been subject to charge. Initially, university education was reserved for the few chosen. Lisha Liu (2012, p. 107-113) writes that in China it fell within the elite model. The programme to popularise such education was introduced in the late 1990s and was linked to the introduction of the new Higher Education Law in China (1999), which brought with it an enormous organisational freedom for the private sector at this level (Mańkowska, 2014). Shi Li and Chunbing Xing (2010) refer to the late 90s period as the time of China's great educational leap. Comparative scholar Gu believes that the popularisation of higher education was intended to help China's underperforming economy (Gu, 2014). One solution was to invest in education at this level. For this purpose, the education sector was expanded (physically as well – by building new schools, university facilities, etc.), new teaching and research personnel was hired, learning centres were established, and so on. Interestingly enough, education fees also increased and Chinese parents, encouraged by, among other things, advertising spots, began to invest in their children's social capital.

Min Weifang (2018) explains that China's economic transition – from a steady, centrally planned economy to a dynamic, socialist one – has also led to a series of social changes, which have had a profound impact on the higher education sector. According to Weifang (2018), the enrolment rate at this level is 15%, which, by international standards, could represent a shift from elite to mass education at the level of higher education.

State policy is also responsible for the popularisation of higher education in China. It operates under the slogan: 'let's revitalise the country through science and education' and is, as researchers Hongxia Shan and Shibao Guo (2016, p. 9-23) note, a part of the socialist modernisation programme. Education is considered the key element for the development of the Chinese economy, with highly qualified personnel being particularly valuable. However, it is important to remember that in educational reforms and transformations, the discourse in the socialist spirit is accompanied by the one of normative modernisation, meaning decentralisation, privatisation, financial diversification, elitism and institutional stratification. The history of the development of Chinese higher education demonstrates that China is responsive to political and social change and is able to draw on and learn from international solutions, though only within a specific range, under specific conditions, typically leaning towards centralised solutions.

## **Key points in the development of higher education internationalisation policy in China**

There has been extensive discussion as part of the research on the internationalisation of education in China, including consideration of its development history, policies and issues (Huang, 2018, p. 23-33; Wang, 2016, p. 223-242). Knowing how these processes have changed and what trajectories they are currently taking is significant, and the processes of internationalisation and their effects on local communities cannot be ignored. Let us therefore look at how the political strategy of internationalising higher education in China has evolved.

The first period, which marked the history of internationalisation of higher education, is when the implementation of the processes of internationalisation of education begins – from 1978 to mid-1980s, especially after the passing of the Open Door Policy (Huang, 2011, p. 265-282). Since China opened up, there have been four transition stages of internationalisation of its higher education, from exploration of opportunities for development, adjustment of internal policies, establishment of cooperation to updating cooperation models. The aim behind the new reforms was based on the will and need to serve the society and to prepare for the emergence of a new China, hence, among other things, investment in talent, observing foreign solutions and adapting them to local conditions were all carried out in an intensified manner. During this time, the first rules were established for students and researchers, so that they could benefit from internationalisation.

In the initial phase, internationalisation of higher education took a basic form in China, mostly limited to sending students abroad to study and carrying out small foreign educational projects (Mańkowska, 2017, p. 37-54). After the end of the Cultural Revolution, there was an urgent need to rebuild the concept of universities as well as the university personnel, thus the support of foreign concepts and personnel was a fairly common practice and significantly outlined the shape of the internationalisation of education in China. It is worth mentioning at this point that strict regulations for educational migration were implemented at that time and rules for departure and return to the country were defined. Migration was possible, however with the obligation to return and rebuild the country with knowledge and skills acquired abroad. Further regulations on travel policy appeared in 1994, with the adoption of recommendations and the establishment of a committee to regulate, recruit and select candidates for overseas departures. By the end of the 20th century, China had established a relatively good policy system to regulate studying abroad, and overseas studies had entered the path of

legalisation and standardisation. In 2009, scholarships for applicants to study abroad were regulated, which, among other things, contributed to an increase in the number of people studying outside of China (Zhou, 2020, p. 110). Nowadays, the opportunity to study abroad is regulated by policies to support the development of overseas studies, encourage returns and regulate movement, but the literature reports that the scholarship system needs monitoring. Currently, most state-funded Chinese student migrations involve departures of 3 months up to 1 year. Such a short experience abroad, according to various researchers (Li and Xue, 2020a, p. 986-998; Li and Xue, 2020b), is not sufficient and does not contribute to building a modern Chinese economy.

I would like to emphasise that the imbalance in the economic and social development of different regions in China has entailed inequalities in the development of higher education and the processes of its internationalisation. The most recent political strategies for ranking universities in China and introduction of university development strategies concern a reform called the 'Double first class' (Mańkowska, 2021). The reform was announced in October 2015 and its main objective was to increase and intensify the internationalisation processes of all universities. It deepens the discrepancies in the development of higher education institutions. The requirement of participation in internationalisation processes forces some higher education institutions, which are not ready for such processes, to engage in actions which bear the hallmarks of internationalisation (artificially increasing the number of international students by referring to dual nationality) or to introduce practices, which appear as related to internationalisation, but only at the formal level (entering into cooperation negotiations with foreign universities and deliberately prolonging this process/status for years). The plan to create 'Double First Class' universities has been centrally imposed and is mandatory – it has been prepared for the next 30 years, and universities and colleges are responsible for its implementation. Under the current rules, universities are tasked with the development and implementation of local strategies to internationalise education, with a particular focus on reaching out to foreign scholars and lecturers, creating Chinese and foreign study programmes and increasing the number of foreigners in Chinese universities. Another example of new international responsibilities imposed on universities is the running of pilot university branches, colleges and Confucius Institutes abroad. Not all units succeed in these efforts. Universities that are not at the top of the ranking lists are, unfortunately, much less likely to engage with universities from the world's top ranking lists, preferably English-speaking ones. Thus,

they often engage in projects and undertake activities of little importance or international relevance, merely fulfilling an obligation imposed on them by law and ranking – looking for formal solutions, not practical, yielding long-term collaborations. In recent years, however, there has been a noticeable increase in financial investment in the educational internationalisation processes, which can certainly accelerate the internationalisation of higher education (Li, 2021). It turns out that the issue of additional funding does not solve the problem, which is the quality of the procedures implemented and the internationalisation activities undertaken. The effect of suddenly announced new funding strategies and promises is that Chinese universities of varying research and teaching quality are looking to undertake international cooperation wherever possible. In many cases, foreign universities, which are also faced with the need to internationalise higher education, undertake cooperation on either unfavourable or Chinese-dictated terms, becoming a pariah in the inter-university community. It is not uncommon for cooperation arrangements and rules to be ‘coordinated’ by special Chinese consulting firms.

In line with the existing policy and strategy for the development of internationalisation, as early as 1999, the Ministry of Education, together with the Ministry of Public Security, investigated, verified and allowed the existence of special agencies in the market responsible for mediation concerning the provision of overseas educational services. Such consultancy-mediation agencies are engaged in organising foreign educational offers for Chinese universities. Despite state regulation and supervision of said companies, China still struggles with problems such as illegal mediation, unlicensed activities, subletting, subcontracting, high fees, fraud etc. According to researcher Jian Li (2021), there is an urgent need in China to strengthen the legal system of policies for abroad studies and standardise their coordination.

A significant moment for the internationalisation of higher education in China happened when the country joined the World Trade Organisation in 2001. That time saw intensified efforts, with the Chinese name and character given to the internationalisation of higher education ‘Chinese Foreign Cooperative Running School’ (CFCRS) (Hou, Montgomery and McDowell, 2014, p. 300-318). China began to engage more significantly in internationalisation processes, globally as well, following the principles of the General Agreement on Trade in Services (GATS) (Mok and Ong, 2014, p. 133-155), which considered education as a service that could be sold worldwide. Today, Chinese higher education follows neoliberal trends, however, without understanding of the market ideologies or interpreting them in its

own manner. Many Asian countries actively 'buy' educational services from developed countries, including the United States, the United Kingdom and Australia (Altbach and Knight, 2007, p. 290-305), but also sell them; it is a common practice.

With the beginning of the twentieth century, economic progress in Western Europe, South America and Asian countries, as well as elsewhere in the world, gave way to the liberalisation of the global investment market, which over time created an open labour market, contributed to the growth of multinational companies, sudden development of information technology, leading to the emergence of a global economy. Since the early 80s, one can observe the impact of the global economy on local politics, culture, science and technology, as well as education, which over time has become one of the main areas occupied by globalisation processes. In the case of China, the economic globalisation of the world has provided a major stimulus to the internationalisation of education. The rapid growth of multinational companies has contributed to the promotion of foreign solutions, work ethic, culture in general and, above all, knowledge, which has gained an unprecedented value under the new conditions. Knowledge and new opportunities to acquire it have changed the way people view their abilities and talents, and increased the desire for a solid foundation of knowledge, which no longer had to be local. The widespread use of information technology around the world has made it possible for information and knowledge to break down the barriers of time and space, allowed for them to synchronise, to flow at the same time, thus improving access to both general as well as specialised knowledge. Thus, it was natural to coordinate the processes of internationalisation of knowledge, transfer of people and ideas according to one's own, local conditions.

One of the plans involving the internationalisation of higher education refers to the concept of the Outline of the National Plan for Medium- and Long-term Education Reform and Development, envisioned for 2010-2020, according to which there is an urgent need in China to continue the economic and educational opening and to increase the requirements for the introduction of high quality education, as well as to expand and strengthen the exchange and cooperation of Chinese universities with the world's top-ranked universities.

Another significant plan to internationalise education under local conditions is the One Belt One Road (OBOR) initiative, an expression of China's *going global* or *Go Global* policy. It is a way to open China to new markets and create a network of Chinese businesses and influence, strengthening China's position as a global player. China needs a vast transfer of knowledge

and access to foreign technology, and education, especially at the university level, constitutes its ideal source (Mańkowska, 2020, p. 151-160). China has a long-term experience in combining science and industry and organising the transfer of knowledge. OBOR is not the first global-Chinese plan and will probably not be the last. Already in 2017, at the initiative of the Middle Kingdom, the Asian Universities Alliance (AUA) was established in Central Asia and North Africa, with research centres in Astana, Kazakhstan, or even in Casablanca. Under the OBOR plan, the scope and scale of cooperation has changed, interpreted on Chinese terms<sup>2</sup>. The OBOR plan in the context of university education envisages strengthening of connections between the countries, new cooperation and bilateral agreements, talent scouting – new scholarships and abroad trips to China, cooperation between educational institutions and enterprises, creation of institutions for the acquisition of double diplomas, establishment of Polish-Chinese consortia, foundations dedicated to science, facilitating cooperation (Mańkowska, 2020). The said cooperation between universities is to follow the principles of maintaining the Asian framework, as well as taking into account local politics. Another mega-strategy involving the internationalisation of education among its member states is the alliance of the BRICS countries (Brazil, Russia, India, China, South Africa), a powerful economic lobby group in today's competitive global environment.

### Summary

Currently, the policies governing the internationalisation of education focus on how to attract students, increase the number and scale of students studying in China. The Chinese are particularly interested in attracting knowledge and skills capital from abroad. The whole strategy behind the initiatives mentioned and described above shows that the plan has been prepared and will be implemented. China thinks and acts globally, with momentum and international reach, yet, there still remains a lack of detailed discussion and attention to the effect of implementing local solutions. China focuses on macro-scale projects, which introduce alliances and international solutions regulated directly by China itself (e.g. OBOR), or transnationally (e.g. the BRICS alliance), where China is one of the main players. Local

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<sup>2</sup> I analysed whether OBOR will shape higher education globally in 2020 in an article titled *Chiński plan OBOR. Czy Chiny zmienią edukację wyższą na świecie?* [eng. *China's OBOR Plan. Will China Change Higher Education Worldwide?*] Details are provided in the bibliography.

solutions and problems (on micro-scale), especially in less developed areas, are neglected or overlooked. In international education policy, the Chinese authorities look for opportunities to influence the global academic scene and seek new and profitable ways to trade knowledge and to educate.

The analysis of the history of higher education development indicates that China has been able to benefit from foreign solutions, knowledge and skills in the past, and the current ongoing internationalisation strategy illustrates that such activities will be continued, on Chinese terms, however.

Current internationalisation measures fail to provide for the needs of even, economic progress. Regulations should include qualification standards to be met by candidates for abroad studies, transparent rules and fair qualification of international programmes at all universities in the country. It is within the interest of the state to coordinate internationalisation processes throughout its entire territory, not just in the selected areas at the highest ranking universities.

Accumulated internal problems, not solved in time, will certainly lead to an accumulation of difficulties. Some of these were referred to in the body of the article – fraudulent networking, engagement in cooperation only at the level of negotiations, illegal educational mediation, etc. There is a need for politicians and scientists to look at local solutions, to agree on a plan of action focused on ways in which internal inequalities in internationalisation processes within China can be affected.

From my personal point of view of undertaking international cooperation on an individual level – as an assistant professor (engaging in projects with Chinese entities) and at university level (creating hybrid studies, so-called joint studies, etc., preparing educational offers for Chinese students), it seems important to familiarise oneself with political trends and existing cultural differences. Chinese institutions and centres are currently looking for solutions, also in Poland. Moreover, they will be looking for cooperation opportunities that, in European terms, do not necessarily fall within the same research and teaching ethical framework, which is something I would also like to indicate.

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## **Policy and practice on school principal recruitment and professional development in South Africa and Poland**

**Abstract:** This paper aims to compare policy and practice on school principal recruitment and professional development in South Africa and Poland. Common challenges and different responses are discussed, focusing on the following: (i) the requirements to become a school principal; and (ii) preparation and professional development of school principals. The analysis is based on a review of the law in the field of education and accompanying executive regulations in South Africa and Poland and a literature review on school principal education. We focused on the link between school leadership and school principal education. A comparison of national policies on recruitment and education of school principals in these two countries revealed common challenges in the two contexts, which directed our attention to the following questions: (1) How can principals' professional development be understood on a continuum of static to dynamic practice? (2) What is the influence of context on principals' professional dilemma of being an isolated practice to allowing for contextual influence? (3) How is a balance struck between individual and collaborative professional development of principals to improve quality education for all learners? Lastly, conclusions – which are of relevance to policy, practice and further research on school principal recruitment and

education – are drawn. This study underscores the professionalisation of school principal development.

**Keywords:** school policies, school principal recruitment, preparation and development, school leadership, South Africa and Poland, quality of education, comparative study.

## **Introduction**

Globally, it is increasingly recognised that having high-quality teachers and school principals at schools is key to improving student learning, and the countries with the highest-achieving education systems make substantial investments in the quality of teaching staff and school leaders (OECD, 2005, 2019). Key features of high-quality education systems include “multiple, coherent and complementary components associated with recruiting, developing, and retaining talented individuals to support the overall goal of ensuring that each school is populated by the effective teachers” (Darling-Hammond, 2017, p. 294). There is broad scientific evidence of the importance of school leadership for school quality (Hallinger and Huber, 2012). In times of uncertainty and risk, the expectations of society towards school’s change. Therefore, school leaders are confronted with a more complex, wider range of tasks. Furthermore, recruitment, preparation and professional development of school leaders have increasingly become a concern in many countries. Hence, critical studies on policies and practices on school principal recruitment, preparation and professional development are needed to contribute to the academic knowledge base and to make recommendations for policy formulation and implementation in the education system. Identifying aspects of the requirements for prospective school principals and the procedures of principal recruitment, preparation and professional development that can affect the quality of education are crucial steps in finding ways towards school improvement.

This paper aims to compare policy and practice on school principal recruitment and education in South Africa and Poland. It focuses on the requirements to become a school principal and the preparation and professional development of school principals in both countries. The analysis is based on a review of the legislation and policies in the field of education and accompanying executive regulations in South Africa and Poland and a review of current literature on school principal education. A comparison of South African and Polish national policies on school principal recruitment and education revealed common challenges in the two contexts.

These challenges directed our attention to the following complex questions: (1) How can principals' professional development be understood on a continuum of static to dynamic practice? (2) What is the influence of context on principals' professional dilemma of being an isolated practice to allowing for contextual influence? and (3) How is a balance struck between individual and collaborative professional development of principals to improve quality education for all learners?

### **Requirements for the role of school principal**

South Africa and Poland have made attempts towards “double democratisation” – that is, the simultaneous democratisation of both education and society (Davies, 2002). These changes created a space for nurturing qualities such as participation, innovation, co-operation, autonomy and initiative in learners and staff (Madalińska-Michalak, 2023; Naicker and Mestry, 2016). Political expectations to delegate more responsibility to individual schools in both countries direct the attention to the quality of school management and leadership and, therefore, the issues of school policy development for the recruitment, preparation and professional development of school principals.

The requirements and procedures to become a school principal in South Africa show that from a legal perspective, the status of a school principal in the country is currently determined by, among others:

- National Education Policy Act, No 27 of 1996 (Republic of South Africa, 2016a).
- The South African Schools Act, No 84 of 1996 (Republic of South Africa, 1996).
- The Employment of Educators Act, No 76 of 1998 (Republic of South Africa, 1998).
- The Labour Relations Act, No 66 of 1995 (Republic of South Africa, 1995).
- The Policy on the South African Standard for Principals, No 323 of 2016 (Republic of South Africa, 2016c).
- The Personnel Administration Measures (PAM) in terms of the Employment of Educators Act, No 27 of 1998 (Republic of South Africa, 2016b).

In Poland, the status of a school principal is currently determined by the following:

- Law of December 14, 2016 Education Law (Education Law, 2016).

- Law of January 26, 1982 Teacher's Charter (Teacher's Charter, 2019).
- Regulation of the Minister of National Education of 11 August 2017 on the requirements to be met by a person occupying the position of director and other managerial positions in a public kindergarten, public primary school, public secondary school, and public institution (Minister of National Education, 2017).

In addition to the above-listed legislation, the status of school principal in both countries is determined by many other legislation, counting only the Acts in the field of educational law.

According to the current education legislation in both countries, a school is managed by a teacher who has been entrusted with the position of school principal by the leading authority. This entrustment follows an appointment process that is based on principles of competition. The law in both countries also requires that the person who accepts the position of school principal must be a registered teacher. In South Africa, the requirements to be appointed as a principal is a four-year teacher qualification, seven years of actual teaching experience, and being registered with the South African Council for Educators (SACE) as professional educator (Republic of South Africa, 1998; Republic of South Africa, 2016b, p. 65). Moreover, in South Africa, for professional development, different university-based qualifications have been required to be a school principal – for example, an Advanced Certificate in Education (ACE) Management and Leadership. An Advanced Diploma (AD) in Education Management and Leadership replaced latter qualification. Although the national Department of Basic Education (DBE) indicated that they wanted this qualification to become an official requirement to be appointed as a principal, so far, this has not realised. The expectation of the national and the provincial departments is that the programme must empower students (principals and other leaders in the school context) to have a direct influence on the improvement of the examination results at their schools.

In Poland, the post of school principal must be filled by a teacher with a professional advancement degree (nominated teacher or certified teacher). The requirements to be a school principal seem to be more complex than in South Africa, as the person who aspires to the post of school principal should meet the following cumulative requirements:

- They should have completed a master's degree, pedagogical preparation, and qualifications to occupy a teaching position in a kindergarten, school, or institution.
- They should have at least five years' teaching experience as a teacher, or five years' teaching experience as an academic teacher.
- They should have completed higher education or postgraduate studies in the field of management or a qualifying course in the field of education management conducted in accordance with provisions of in-service teacher training establishments.
- They should have received at least a good evaluation of their work or a favourable assessment of their professional experience.
- They should have satisfied the health conditions necessary for the performance of a managerial post.
- They should have full legal capacity and should enjoy full public rights.
- They should not have been validly punished by means of a disciplinary penalty and is not subject to disciplinary proceedings.
- They should not have been convicted of a premeditated criminal offence or a premeditated fiscal offence.
- They should not be the subject of criminal proceedings in a court of law (Madalińska-Michalak, 2019).

The *sine qua non* conditions are thus numerous for being appointed as a school principal in both countries. However, there is a clear difference between the issue of formal requirements in the context of qualifications and the form of appointment. In Poland, future school principals must complete higher education or postgraduate studies in the field of management or a qualifying course in the field of educational management conducted in line with provisions of in-service teacher training establishments, whereas in South Africa, there is no such a need. In addition, in South Africa, the appointment as principal is permanent, with no restrictions on the number of years of appointment. In Poland, the post of school principal is awarded for only five years. However, there are no legal provisions limiting the number of terms of office a school principal can serve in a school in Poland. It may be the case that a school principal is in the position at one school and for the next five years, in the position at another school.

### **Responsibilities and professional development of school principals**

In South African and Polish legislation on education (and in the other legislation not directly focusing on education), details are provided on varied tasks to be performed by the school principal. However, attempting to define what lies behind the term of school principal solely through the competencies with which such a person is equipped, the tasks they must carry out and the powers they may exercise, is a difficult undertaking, not always leading to a condensed, clear, precise and applicable understanding in diverse contexts. The principal's primary task is broadly understood as the management of a school, and this applies to both countries in this comparative study. The principal is the external representative of a school, responsible for all staff. An important additional task is the chairperson of the board of education in Poland, and only a member of the school governing body (not the chair, who must be a parent) in South Africa. Moreover, in both countries, the school principal is not only responsible for the administration of the school but also performs a thorough pedagogical function, fostering the development of teachers, pupils, parents and the school environment. School principals must conduct all these functions and responsibilities within the broad context of school democratisation and competitive new public management.

Considering the similarities in the main responsibilities and tasks of school principals, the issue of professional development of school principals in both countries arises. Preparation and professional development of school principals are international phenomena (Brauckmann et al., 2023). The emphasis is on professional development of school principals, with specific academic programmes designed for them, which may be significant for school quality and the functioning of the principal as a professional (Tingle et al., 2019).

In South Africa, PAM provides the official responsibilities and requirements for the work of the principal. PAM and the South African Standard for Principalship do not mention any requirements for professional development of principals; they only refer to the principal's responsibility to develop teachers. On the other hand, there is a legislated process – continuous professional teacher development (CPTD) – for teachers, including principals, managed by the South African Council for Educators (2011). This system is supposed to record the development of teachers and school principals, but it is not functioning properly. Therefore, it is not a motivational factor for professional development at any stage of a principal's career. It was supposed to make development in this instance more dynamic and continuous but seems not have achieved this (Moteetee, 2019; Xaso et al., 2017).

The existing development pre-service and in-service opportunities for school principals and academic (university) qualifications (Mestry & Singh, 2007), opportunities provided by NGOs (Kirori & Dickinson, 2020) and teacher unions are not fully used by school principals in South Africa. Different university-based qualifications – for example, an Advanced Certificate in Education (ACE) Management and Leadership (Bush, 2011) – have been replaced with an Advanced Diploma (AD) in Education Management and Leadership, presented by universities mostly on contact basis to specific selected cohorts. Although the national DBE has indicated that it wants these qualifications to be an official requirement for the appointed as principal, so far, this has not realised. This seemingly ad-hoc approach to principal development (Bush, 2013) suggests a static approach to principal development.

Naidoo and Petersen (2015) confirmed the challenges of professional development. According to them, principals who have completed an official university-based qualification are still not sure about their role as instructional leaders, which emphasises the challenge to make development a dynamic process (implying continuous development). Sepuru and Mohlakwana (2020) found that new principals were not developed specifically for the management and leadership role and found it challenging to live up to expectations.

As professional development is not compulsory in South Africa, the rate of participation in professional development activities is low. Akin to the South African context, from a Nigerian perspective, Ibara (2014) reported that although there are no professional leadership and management development requirements before or once being appointed as a principal, the need and expectation are for continuous professional development of principals. Mestry (2017) concurs with Ibara that continuous professional development is essential to improve the quality of education in most schools in South Africa.

In 2022, in Poland, a new performance appraisal was introduced for school principals, which undoubtedly considers their professional development. Several strictly managerial criteria are listed among 16 evaluation criteria: organising the work of the school in accordance with the law; planning and organising the work of the educational council and pedagogical council; and implementing tasks in line with the resolutions of the constitutive pedagogical council and the school council. The school council is responsible for the following: organising the work of the school in accordance with the law; planning and organising the work of the board of education; carrying out tasks in accordance with the resolutions of the board of education and the school council; cooperating with other school organs, ensuring effective

co-operation with other school bodies, and ensuring effective flow of information between these bodies; correctness of keeping and storing the documentation of the course of teaching; creating conditions for the implementation of teaching, educational and caring tasks; and ensuring the safety of students and teachers during classes organised by the school; exercising pedagogical supervision; supporting teachers in their development and professional improvement of teachers; improving own managerial competence; correct management of budgetary resources allocated to the school; and correct performance of activities in matters of labour law in relation to school employees, among others. At each appraisal, the level of performance is established, but no reference is made to previous evaluation.

To summarise, in Poland, the school principal is obliged to develop personally and professionally but should do this on their own. Evaluation of these activities is static in nature. It is worth adding that in some environments, mutual support groups of principals are created who exchange their own experiences supplemented, for example, by training delivered by experts.

### **Challenges of school principal professional development: towards professionalisation**

The analysis presented so far directs our attention to the shared challenges of school principal recruitment and their education in two different contexts (South Africa and Poland). Responses to such challenges vary considerably. Drawing on the work of Madalinska-Michalak et al. (2023), we argue that at least three complex questions should be addressed to discuss the professionalisation of school principal development in South Africa and Poland. The following subsections address the above-stated question on professional development as a static or dynamic practice, an isolated or embedded practice, and an individual and collaborative professional development practice.

#### ***A static or dynamic practice***

The complexities associated with education and schools show that professional development of school principals must be a part of lifelong learning, and it should be perceived as a dynamic process and driven by context (Hallinger, 2018).

Appointment to the position of school principal in South Africa shows that it might be a lifelong position, with no restrictions on the number of years of appointment. In addition, there are no formal requirements for any professional development. As indicated above, school policy solutions in

this regard have their own implications for the practice of school principal professional development, and this can influence expectations for the professional development of school principals. The concept seems to be perceived as a static rather than a dynamic process, since it is not required of principals to do any development and, therefore, they are static in their post and position. Proper incentives may motivate school principals to be engaged in continuous professional development for the sake of school quality.

In Poland, on the other hand, appointment to the position of school principal is made due to competition held by the local governing body. The post of school principal is awarded for only five years. The period of entrustment as school principal is, therefore, short – the adaptation time of a newly appointed school principal and the acquisition of some management practice generally coincide with the end of the entrustment period. As the candidates in competition are generally teachers at the school in question, it appears that the legislature, in construing legislation, has included another implicit criterion for the selection of school principals for the next five years. If, apart from the incumbent school principal, none of the school staff enter the competition, it can be assumed that the entire teaching staff accept this person (at least not negated). It is worth noting that this procedure can be repeated in specific circumstances several times every five years.

A new performance appraisal of school principals, which has been introduced in 2022, undoubtedly directs our attention to the continuous professional development of Polish school principals. The recruitment process of school principals and new regulations on their professional development are based on what we can expect novice and experienced school principals to be able to do while they perform their roles. At the heart of the introduced school policies is a solid logic for focusing on the notion of quality in performing the role of school principal. However, the school principal is obliged to develop personally and professionally, but they should do this on their own, which indicates an isolated approach to professional development. In some environments, mutual support groups of principals are created that exchange their own experiences supplemented, for example, by training delivered by experts. The evaluation of these activities is static in nature. According to the new law, the level of performance of school principals in different aspects is established, but there is no indication that reference should be made to previous evaluation. Research on school principals shows that professional development of school principals should be perceived as dynamic rather than static to accelerate professional learning among principals, anchored

in building educationally rich everyday practices (Day et al., 2014; Goldring et al., 2012).

### ***An isolated or embedded practice***

The expectations of principals are contextual and would, therefore, differ from country to country. In the case of South Africa and Poland, the emphasis is different with regard to the development requirements and expectations regarding what principals must do and achieve. In the South African context, the political influence of the dominant political party and the dominant teacher union plays a key role in policy for and development of principals. The lack of compulsory development before appointment and during their period as principal does not put any pressure on principals for further professional development.

Principals as leaders of schools in high socio-economic contexts may have different professional development needs compared to those in low socio-economic contexts or deprived areas. Similarly, context can also change – for example, the influence Covid-19 had, and war, for instance, in Syria and Ukraine – which emphasises the contextually embedded professional development need expected to achieve quality education for all.

Gabrielle (2019) indicated that in the quintile one, two and three schools in South Africa (which are the poorest; more than 60% of schools), attrition of principals and specifically succession planning have a negative influence on the performance of these schools. The embedded context of schools in poorer socio-economic contexts is also associated with limited development opportunities for these principals. It seems to be a contributing factor to why principals are either leaving for better possibilities or retiring early from these challenging contexts.

Naidoo (2019) emphasises the embeddedness of professional development in challenging circumstances of schools. Although there are challenges as regards the Advanced Certificate in Education university qualification, this programme has some advantages, especially as there are no official requirements for the appointment of principals. Naidoo argued that professional development must be embedded in the South African school context, which may have a positive influence on the quality of education as argued elsewhere.

Mosoge and Mataboge (2021) emphasised the responsibility of principals to develop school management teams (SMTs). There are many challenges, among others, that principals do not understand their own instructional leadership roles and therefore find it difficult to develop SMTs. These challenges are embedded in most schools in South Africa, since many principals

still follow the more autocratic leadership approach, which was part of the country's history before the adoption of a full democratic society in 1994. They find it difficult to change to a more participative and instructional leadership role. This article argues that this can be changed through a dynamic process of professional development that is grounded in collaborative development initiated by principals. As the changing curriculum and technology during the Covid-19 pandemic have indicated, development must be dynamic and contextual, otherwise principals' knowledge and competencies may become outdated, which may have an influence on their ability to lead towards change and improvement.

The South African Democratic Teacher Union (SADTU) – an affiliate of the governing party's tripartite alliance – plays a significant role in the recruitment, appointment and development of principals, while there is not such a strong influence in Poland. This is an example of external contextual factors that need to be considered in the development of policies on principal appointment and development.

In Poland, for the post of school principal, the law determines the composition of a competition committee whose aim is to balance the various groups of influence (e.g., parents, teachers, local government, school superintendents, trade union organisation). As regards the selection of the school principal, the composition of this committee shows the potential greater influence of local government representatives and school superintendents compared to other representatives on the committee.

During the tenure of the school principal, the political composition of both the local and governmental authorities may change, which is reflected in subsequent editions of competition. At the same time, potential “new” politicians must accept the choices made by the previous political composition. Representatives of the teacher's council and parents' council reflect the intra-school social differentiation. They are the entities that interact most closely with the principal – therefore, their interests are not overlooked at this stage of their selection. Finally, the interests of trade unions, expressed by their representatives on the selection board, may strengthen or weaken the voices of teacher representatives but also express the views of union headquarters.

It can be concluded that the position of school principal of a Polish public school is firmly embedded in a political and environmental context – these factors must be taken into account by candidates for the position of school principal, and incumbent school principals should show flexibility during their tenure, depending on the national and local political turmoil

surrounding the school they direct. At the same time, the law stabilises their position and requires continuous professional development of them.

### ***An individual or collaborative practice***

Shared, delegated or participative leadership are accepted as a preferred leadership approach; therefore, principals' professional development cannot be an individual activity only focusing on individuals' personal development. Shava and Heystek (2019) noted that principals' own professional development must have an influence on the collaborative effort of teachers, learners, parents and other role players to improve the quality of education. They reported that at well-performing schools, principals play a key role in the development of staff members, which leads to quality education. An important aspect of providing quality education is to create a positive culture at the school, which also emphasises collaborative effort.

Bush (2018) argued that principals need to be socialised through a process of professional development to grow into the post and responsibilities of a principal. This is aligned with the collaborative process of the principal's leadership to be accepted as the leader of the school towards improvement and quality education. Principal development cannot be an individual activity for the principal as agent only; it must be a collaborative process where the individual, school staff and role players outside the school, including the provincial legislator, collaborate to ensure consistent and continuous development opportunities.

In the South African context, Makgato and Mudzanani (2019) and Msila and Mtshali (2011) highlighted the importance of the development of principals. However, they emphasised that not only principals must be developed; collaborative and shared leadership must also be part of principals' development. The official expectations and measurement of principals are conducted annually with the quality measurement system (QMS). According to the QMS, there are only two references to self-development on which principals are assessed: they attend and participate in departmental, union and other professional activities aimed at enhancing their professional skills; and professional conduct, with reference to punctuality, presentable appearance, and respect towards others (Education Labour Relations Council, 2020). However, the unofficial measurement and the publicly displayed assessment is the Grade 12 school-leaving examination results, which is published annually as a public document on the Department of Basic Education web page (Department of Basic Education, 2023). These official responsibilities, and specially the unofficial assessment, must be seen in the

context of the complex socio-economic situation of the country, which has a significant influence on examination results, and principals have limited power to take responsibility for this influence. Collaborative principal and teacher professional development may have an important influence on the improvement and positive academic achievement of schools. This emphasises the need for not only an individual approach to professional development but also a collaborative approach.

In Poland, there is a lack of adequate analysis at the level of the national ministry on how school principals' roles are performed. Some activities were undertaken by the Centre for the Development of Education, which, through its own identification of the needs of the environment, conducted training, conferences and prepared publications to support school principals. A few activities were also undertaken by the Institute of Educational Research (which is directly connected to the national ministry), but these have been abandoned since 2016 after the latest education reforms. One gets the impression that politicians have no idea how to support school principals institutionally, neither do they have the courage to cede this task, too, for example, local teacher training centres. Local initiatives in the form of the creation of so-called school principal networks are incidental and are often abandoned after one or two meetings due to a lack of public funds allocated for this purpose. Action is also hampered by the need for certification of non-public centres of excellence. This is not an easy undertaking and is not always financially successful. In contrast, public centres are generally focused on providing teachers with at least part-time methodological advisors while a management advisor/consultant in many settings is not feasible. One also senses a strange attitude from the superintendents' representatives on this issue: as the principal is appointed by the local authority, it is in the local authority's interest to ensure that they perform the best possible accepted roles. This is a strange view, since of the 16 criteria for assessing school principals' performance, only three or four involve finance and "pure" management; the others involve pedagogical supervision, which is also the responsibility of the school superintendent, that is, a representative of the State.

### **Summary and conclusions**

We explored the policies on recruitment, appointment and professional development of school principals in South Africa and Poland through a literature review and document analysis (formal documents and legal sources). The comparative lenses we used allowed us to provide a perspective on the identified issues from the two countries; it was not a direct comparison

between the two countries. Context, implementation and challenges were the main focus and therefore, the purpose of the study was not to compare specific issues in detail but rather to focus on how context influences these identified issues for principals. This is a similar approach to what Lumby (2008) did in the *International handbook on the preparation and development of school leaders* and Derring et al.'s (2005) study, who used their research on educational leadership development in Finland, the Netherlands, and France.

This study underscores the professionalisation of school principal development. It is important to acknowledge that the professional development of school principals is not an isolated activity for the sake of personal development, which would only benefit the individual, and, therefore, also not a static activity. School principal professional development must be part of lifelong learning, embedded in context, which is a dynamic process. The dynamism must be reflected in the requirements and change in which the principal is acting but should also be an actor of change. The context demands and requires professional development of school principals to ensure change, improvement and quality performance.

The presented findings inform policy and practice and simultaneously contribute to further research on the socio-professional status of school principals in South Africa and Poland and on working conditions and school leaders' preparation and development. This study can serve as the foundation for further empirical work to provide a deeper understanding of how context influences the implementation of policy as well as the practice of principals. Moreover, the presented analysis encourages research on school principal development in the context of the presented challenges. A question for further research can be as follows: How does school policy on school principal recruitment, preparation and professional development affect their practices and efforts to develop school quality? Empirical investigations could follow a qualitative approach. Focus group interviews with successful school principals on the development of school policy on principal recruitment, preparation and professional development may be used as a research method in further research.

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## **Development of residential schools for Indigenous minorities in Canada – selected problems**

**Abstract:** The article discusses the issue of the relation between education and the processes of assimilation and discrimination of Indigenous minorities (Indian and Inuit) in Canada. Particular emphasis is placed on reconstructing educational practices and the educational policy within the Canadian school system (especially destruction of the pupils' ethnic identity in residential schools). An attempt is made at examining the relationship between schooling, religion, socialisation, forced Christianisation, language policy, and the development of aboriginal minorities in Canada.

**Keywords:** education, ethnic minorities, Canada, residential schools, assimilation, discrimination.

### **Introduction**

Policies aimed at integrating ethnic minorities into the culture and rationality of the dominant communities, wishing to preserve the cultural or national unity of the state, are usually implemented using a diverse range of violence. In the process, a variety of actions attempting to deprive minorities of their own identity are involved. The policy of violence against Indigenous nations has its own specific dynamics. This is due to the fact, that in many cases these communities have been deprived of their rights to the land which they had inhabited for thousands of years, brutally pushed to the margin of culture, frequently indoctrinated and deprived of national identity by a culturally foreign education system – imposing the language,

ways of perceiving the world and values of the dominant groups, and in some cases – exterminated.

The overall picture which emerges from the history of conquest of the territories of what is now Canada, portrays the colonisers' activities as related to the increasing processes of assimilation, acculturation and destruction of Indigenous populations. In the first stages, this was connected to the use of representatives of Indigenous communities as an aid to the annexation of newly discovered territories – for example, as trading partners and guides. In subsequent stages, measures were taken to 'civilise' the Indigenous people. Over time, the brutal activities of state institutions, combined with the destructive religious influence of the Christian churches, resulted in dramatic changes in the ways in which Indigenous minorities functioned, related to the severance of their cultural ties – which was associated, in the case of numerous ethnic groups, with rejection of their own customs and beliefs and often with destruction of their culture or language – and, in some situations, with brutal extermination of the Indigenous population.

The institutions very often used as an instrument for implementing these types of policies are schools. This was also the case in the development of modern Canada. In the first stages, education was used by church institutions to impose the Christian religion. In later phases, the predominant focus was on indoctrination with state ideologies (particularly national ones).

The aim of this article is to present the selected problems related with the origin, development and functioning of residential schooling in Canada. It is an example of how instrumental, but also oppressive and destructive, was the functioning of the Canadian education system, created for children from Indigenous minorities. The main axis of the article is to show the subordinate role of institutional education in the Christianisation and state-building processes of modern Canada.

### **The origins and development of education for Indigenous minorities in Canada**

The origins of schools for Indians and Inuits in the territory of present-day Canada are connected with missionary activities. One may also state that it coincides with the beginning of European settlement in the area. As early as 1632, Father Paul Le Jeune, the head of the Jesuit Mission in New France, began his work. He made the decision to educate Indigenous people, which would introduce them to the influence of European civilisation. Upon this premise he opened a school in Quebec in 1635, for French and Indian children. It was an unsuccessful endeavour and the school was closed as early

as 1642. Another attempt was made by the Ursuline Sisters, who established a school for Indian girls in 1639 (Waller, 1965).

In 1668, Louis XIV sent a letter to bishop Laval, encouraging him to take action aimed at changing the lifestyle of Indians and making them adopt the French way of life. For this purpose, the bishop made an effort to establish a school for Indian boys. In addition, a few years later, he allocated funds for the work of three teachers to teach Indian women spinning and knitting. In other areas of modern Canada missionaries undertook educational activities as well. In 1676, the Sulpicians opened a vocational school for Indians on the Island of Montreal. In turn, members of the Order of Augustinian Recollects undertook activities among the Montagnais and Algonquin tribes of the Saguenay settlement, the lower St. Lawrence River and the Ottawa River (Waller, 1965).

In contrast to education in the United States, where there was a clear separation of church and state, the involvement of churches in schooling in Canada, as well as the role of religion in education, increased with each decade (Noonan, Hallman and Scharf, 2006).

The dynamics of the conflicts between the British and French empires also had a profound impact on both the functioning of the Indian and Eskimo tribes inhabiting these areas of the North American continent (Rusinova, 2003), as well as the development of educational institutions created for the Indigenous people. When New France was absorbed into the British Empire in 1763, the Roman Catholic Church's involvement in Indigenous education was already significant (Waller, 1965).

Meanwhile, the growing amount of interactions between the Inuit and Europeans in the north-eastern areas of the American continent was connected with the activities of the Hudson's Bay Company. Between 1670 and 1870, the Company was associated with the conquest and annexation of the Far North territories (White, Beavon, Peters and Spence, 2009). The first white teachers in the polar areas were also missionaries. The first schools in the Arctic areas began to operate around 1790 on the Labrador Peninsula – in the towns of Nain, Okak and Hopedale. They offered education in the basics of reading, writing and arithmetic, with the main emphasis on religious education. By the late 1740s, many Inuit were competent in reading and some even worked as teachers. Inuktitut remained the primary language of education (Dorais, 2002).

Gradually, the influence of other churches began to emerge as well. At the same time, there was a constant competition between the various denominations for influence over Christianisation processes, and the relationship

with the Hudson's Bay Company, which held an actual monopoly over the trade and shaped the relations with the Indigenous people. This competition was particularly noticeable between the representatives of Roman Catholic and Protestant missions (McCarthy, 1995).

Competition between missionaries of different denominations translated into relations within Indian communities. Conversions to Christianity were accompanied by intra-tribal conflicts, which over time took on the appearance of permanent divisions. They were caused, among other things, by activities related with Christianisation, the essence of which was the eradication of traditional beliefs, considered pagan by the missionaries (Rusinowa, 2010).

Typically, fanatical priests were convinced of the need to Christianise the pagans they would meet on their way. For example, Protestant missionaries systematically reinforced negative images of the natives, often portraying themselves in the press as 'Indian experts.' Their aim was to contrast the image of the evil, savage Indian with the civilised man of the West. It legitimised the imperative of Christianisation of Indigenous people (with the aim of 'saving' them), while providing arguments for its proponents (Higham, 2000).

The first Protestant church schools were opened under the auspices of the Church of England Missionary Society. The missionaries made successful attempts to train Indigenous teachers, who carried on the work of teaching literacy among their fellow members of the Mohawk tribe. In 1927, schools were established in Salt Springs and Newmarket, while in 1838 a school was established in Manitowaning, which was moved to Sheguinadah in 1864 (Dorais, 2002).

The activities of the Roman Catholic Church at this time were also rapidly developing in the southern areas of Canada (Waller, 1965). In turn, in the western areas of the Northwest Territories, the development of mission schools took place around 1860, in Arctic Quebec in 1872. The main purpose of establishing mission schools was to convert Indians and Inuit to the Christian faith. In the early period, their activity was oriented almost exclusively towards reading 'sacred' texts and providing them with attitudes and values characteristic of the Christian religion. This is how the activity of the Missionary Oblates in converting the Dene Indians is characterised by M. McCarthy: 'In fulfilling their Catholic preaching mission, the Oblates taught the Dene Indians to read catechisms and songbooks. The syllabic system they adopted was ideally suited for this purpose. During their first contacts, the priests taught the syllabic alphabet to selected Dene representatives, while giving them copies of small religious booklets. In the winter

encampments, these individuals taught the other members of the tribe the ways of reading the syllabograms or use the booklets to lead and teach their own prayer groups. This type of literacy served primarily to teach Catholicism' (McCarthy, 1995).

In practice – it is fair to say – there were no curricula and the missionaries taught according to their own discretion and individual approach. In doing so, they used methods drawn from their own experience in European schools (Vick-Westgate, 2002).

In the northern areas of Canada, missionaries, in search of ways to provide religious education for Indians and the Inuit, developed a method of writing down Indigenous languages using symbols representing the individual syllables of the spoken language. The syllabic alphabet, created on the basis of English, enabled representatives of these tribes to communicate with each other through the written word. A. Vick-Westgate, characterising these processes in relation to Canadian Inuit, writes that 'an Inuktitut speaker could master the syllabic system in a matter of a few hours and transmit it to others. The Inuit incorporated the syllabic alphabet into their set of essential skills and reached a level of reading competence in nearly 90% of the population. Paradoxically, the emergence of a formal education system, mainly based on English language taught by outsiders, unfamiliar with Inuktitut, has led to a decrease in reading literacy rates in the eastern Arctic areas' (Vick-Westgate, 2002). It is worth emphasising here, however, that the main purpose of equipping Indians and Inuit with reading skills was the process of Christianisation.

With the passing of the British North America Act in 1876, the federal government had little involvement in the development of education for Indians. Reports indicated that fewer than 50 schools for Indians were in operation during the 1867-1868 school year. It was not until the passage of the first Indian Act in 1876, and the treaties signed between the federal government and Indian tribes from 1871 to 1921, that the Canadian government made a greater commitment to aboriginal education. This included, above all, more systematic funding of institutions established for representatives of Indigenous communities (Waller, 1965).

The formation of a cohesive education system for children from aboriginal minorities in Canada began in 1868, when the Canadian government decided to finance fifty-seven schools. In doing so, it is worth noting that only two of these (Mount Elgin and Mohawk) were residential institutions. It was not until 1879 that two more residential schools were established – Shingwauk and Wikwemikong in the Ontario province. However, in the

following years, the number of such schools began to increase rapidly. In 1923 there were seventy-one schools in Canada, sixteen of which were industrial schools and fifty-five boarding schools (Milloy, 2003).

In general, the actions taken with regard to Indigenous communities in Canada were very similar to those of the US. This is how I. Rusinowa characterises the actions undertaken towards Indigenous communities in Canada: ‘The policy of the Canadian government towards Indigenous people, as it was in the United States, consisted of plans to civilise, protect and assimilate them. Hence, following the American model, the creation of nomadic reserves was promoted, and the surplus of the tribal lands was meant to belong to the state, which would allocate them to future white farmers coming from Europe to settle. The reserves were to be the centre for converting nomadic Indians into a settled or semi-settled population and, sometime in the future, making them full-fledged Canadian voters’ (Rusinowa, 2010). Depriving the representatives of the Indigenous tribes of land and further influence over the economy on the lands they had occupied previously was also an important political objective (Thielen-Wilson, 2014).

Thus, it can be argued that from the early eighteenth century onwards, the policy of Canadian governments was aimed at assimilating Indigenous minorities with the dominant mainstream culture and rationality (Ormiston, 2002). By contrast, in the late nineteenth century, Canadian education policy towards Indigenous nations became one of the key elements in the formation and unification of the state. It was based on the set of values representing the Western civilisation, including the idea of the white race supremacy over other racial and ethnic categories. From this perspective, ‘education became a key element in the assimilation-oriented politics of nineteenth-century Canada’. The essence of the functioning of education became the socialisation and formation of the younger generation in a framework of Western, capitalist and Christian values (Miller, 1987). The emerging residential schools became extremely important institutions serving this purpose.

### **The functioning of residential schooling for Indigenous minorities in Canada**

It can be argued that in the 1870s, the policy towards Indigenous minorities changed. The Dominion of Canada began to develop a more integrated educational policy. This referred, on the one hand, to a better organisation of education related to the development of school networks and, on the other hand, to the intensification of assimilation practices.

It became the aim of school inspectors and missionaries to encourage parents from Indian and Inuit communities to entrust their own children to residential schools and, in the event of non-compliance, to use coercion and forcibly remove their children and place them in such institutions. What is worth noting, was the commonly held belief among educational bureaucrats and missionaries about the necessity and legitimacy of efforts to separate children from indigenous culture. The influence of the student's family on his or her upbringing was to be minimised, as it was seen as harmful and incompatible with the values conveyed by educational institutions. To this end, residential schools were established at a considerable distance from Indian reserves and Inuit communities scattered in the far northern areas of the country. Such schools were being established consistently in the last decades of the 19th century and, with a few exceptions, continued to operate until the 1960s (Miller, 1987). However, the last residential school did not close until the 1980s.

The development of residential schools was primarily related to missionary activities (Hobart and Brant, 1966). From 1840 onwards, there was a steady increase in their number, with 54 schools in operation in 1898, 74 schools in 1920, and as many as 81 in 1946. By the mid-1940s, 46 institutions belonged to the Roman Catholic Church, 20 to the Anglican Church, 12 to the United Church of Canada and the remaining three schools to the Presbyterian Church. Between 1840 and 1980, an estimated 125,000 Indigenous minority students went through the residential school system (Thomas 2003). J. R. Miller states that during this period, 'Indian youth were sent far from the family home to "industrial schools", institutions run in accordance with the Christian creed, supported by government funds, where they were expected to learn a trade and acquire Euro-Canadian ways of life' (Miller, 1987).

The development of universal schooling began in 1920, when compulsory education was extended to all Canadian children. Previously, schooling applied only to Indians, under the Indian Act established between Indian tribes and the Canadian Crown in 1876. Consequently, the introduction of schooling for Indians became one of the policies of the Canadian federal government. It is worth to note that the Inuit never participated in any form of treaty negotiation, as was the case with the Indian tribes. However, as they were considered included in the umbrella term 'Indigenous people of Canada', they were subject to the same conditions as Indians (Thorleifsen, Larsen, 1995). Consequently, most Eskimo children began their education in residential schools. From 1920 onwards, mission schools were established through financial support from the state (Magosci, 2002).

Already at the end of the 19th century, and in the first decades of the 20th century, legal conditions were becoming increasingly strict towards children from Indigenous communities, as well as with regard to colonial education. Parents were punished for not sending their children to school. Children could be arrested for no reason and forcibly sent to school. Land and grounds could be confiscated for an emerging educational institution. The federal government's education policies entered every sphere of life of Indigenous communities, incorporating children, families, socio-cultural relations and land rights (De Leeuw, 2009).

From 1923 onwards, changes were introduced to the naming of schools. Boarding schools, in 1923, were classified as 'residential schools'. In a similar way began the classification of industrial schools, which were initially more oriented towards vocational training than boarding schools. Hence, from 1923 onwards, both types of school were replaced by the category of residential schools in government reports and statistics (Milloy, 2003).

In fact, such institutions offered education at a very low level. The education programme was based on a basic range of general subjects, with a strong emphasis on vocational ones. The aim of the education was to prepare young people from Indigenous minorities for low-prestige occupations such as a carpenter, printer, blacksmith, farmer - for boys, or a nursing assistant, hygienist, and domestic work such as a cleaner, cook, washerwoman - for girls (Miller, 1987). R. Makka and A. Fleras state in this context that 'the residential school system had a much more fundamental goal than mere education: the separation of children from their own homes and parents and their forced assimilation into mainstream society by producing a separate subclass of workers, farmers and their wives. This programme involved not only the destruction of indigenous languages and cultures, but also the eradication of the indigenous spiritual sphere and its replacement by the Christian faith, under the assumption that it was necessary to "kill the Indian inside the child"' (Makka and Fleras, 2005).

The nature of the Indian child's upbringing in residential schools was different from the nature of the one experienced by the white child in Canadian education. This was, for example, because of white educators' different perceptions of white and Indian childhood, and the need to transform Indian childhood in the process of becoming an adult - along the lines of white children. While the process of raising a white child contained all the elements of imitation in the Europeanised adult world (and, before all, natural modelling in the family and community), the process of raising an Indian child in a residential school was primarily to prevent him or her

from becoming an adult following the example of his or her own family and the Indigenous community. As S. de Leeuw puts it, 'the students in the residential school were more than just children. They were *Indigenous* children, fundamentally different within the context of residential schools, created, operated and directed by non-Indigenous adults. These residential school institutions were sites, where the transformation of Indigenous children into adults, or in fact into non-Indigenous adults, was carried out, according to the white colonial template, created with the categorical intention of shaping the de-indigenised aboriginal citizens of Canada' (De Leeuw, 2009).

The styles of education and upbringing applied to Indian children and young people in residential schools often employed typical strategies used in total, closed institutions, such as convents, the military, and prisons. One of these became the use of military drill to socialise children in residential schools (Habkirk, 2017).

This idea was taken from the general idea promoted by Minister Egerton Ryerson in the province of Upper Canada, starting in 1840. Its essence was the application of drill in all schools, with the aim of implementing discipline and maintaining social order in the emerging state. Another context for this intention was the attempt to solve the problems of adolescent youth (primarily boys) deprived of proper adult care, in working-class neighbourhoods of large Canadian cities such as Toronto or Montreal. The processes of industrialisation and urbanisation were causing increasing problems among young men growing up (such as alcohol abuse, smoking and fights). To counteract these phenomena, the reformers promoted a variety of activities conducted within church organisations (such as Sunday schools), sports activities, scouting exercises or cadet corps. Through these types of activities, young people were supposed to acquire proper moral habits, civic responsibility and, on the other hand, avoid the negative effects associated with increasing urbanisation processes (Habkirk, 2017).

In the 1850s and 1860s, youth-oriented activities increasingly focused on the formation of paramilitary movements and cadet organisations, fitting into a socialisation programme based on Christian and Victorian values. This is how E. J. Habkirk describes these processes: 'Cadet corps became a way of teaching young people discipline, punctuality, dutifulness, patriotism, honour and precision. Their proponents argued that cadet programmes could interrupt the process of feminisation of young boys caused by the increasing number of female teachers in the public school system' (Habkirk, 2017).

These ideas – widely present in the education system in Canada – found a fertile ground in the increasingly widespread residential schools

for Indigenous minorities. Their programme included the introduction of subjects present in public schools and, in addition, orientation of education towards vocational subjects. After the Northwest Territories became part of Canada in 1870, Nicolas Flood Davin (lawyer, writer, politician and advisor to Prime Minister John A. Macdonald), was asked to develop a strategy for Indigenous education in Canada. For this purpose, he visited residential schools in Canada and the United States. His conclusions (Davin Report, 1879) were based on E. Ryerson's blueprint for education and his belief that leaving Indigenous communities to their own ways would result in their destruction. To achieve this, he advocated the acculturation of representatives of Indigenous communities into the Euro-Canadian way of life and thinking. This task was to be accomplished with the use of religious education and disconnection of children from parental influence. The essence of this process was supposed to be the separation of children from their home environment (Habkirk, 2017).

The use of military drill and the organisation of schools along the principles of military institutions became a common occurrence in residential schools – although one not assumed directly by Ryerson or Davin. It was usual in educational practice that school principals and administrators tended to favour this type of arrangement. Such military socialisation served to organise the school appropriately, and the introduction of a military drill facilitated the implementation of adherence to the values of the dominant cultural trend of the society (Habkirk, 2017).

The very architecture and specificity of the geographical location of these institutions was connected to the functions they were supposed to perform in relation to the representatives of Indigenous communities. S. de Leeuw, analysing the functioning of residential schools in British Columbia, notes that 'they operated on the basis of a clear message of assimilation-oriented policy: the task of residential education was to break the ties that bound children with their communities and cultures and to integrate them into the dominant community. The buildings and material structure of residential schools, in conjunction with their curricular and ideological assumptions present in pedagogical practice, were a reflection of broad colonial efforts directed at Indigenous communities. Architecturally and materially, residential schools transmitted a colonial narrative of non-Indigenous domination over First Nations representatives' (De Leeuw, 2007).

It must be pointed out that the buildings were often located in areas which contradicted the 'uncivilised wilderness' of the original socialisation sites of Indian children. They were therefore located in open spaces, which

had been previously used for agriculture. They were intended as a contrast and negation of the indigenoussness associated with savagery and to confirm Euro-colonial ideas of civilisation and progress.

The architecture of residential schools in itself provided an alienating environment for children previously brought up in very different circumstances. Buildings with branching hallways and large sleeping quarters represented the lack of anonymity and reflected the control exercised by school personnel over the children. The school buildings were designed to facilitate the monitoring of pupils' movements, as well as their discipline. In practice, the open rooms and cross-plan corridors gave the personnel a full view of any movement taking place on the premises. Residential school buildings usually consisted of several buildings. The main school building and dormitories were surrounded by smaller buildings which included the chapel, rooms for teachers and staff, utility rooms (barn, stable) and homesteads for livestock. Many residential schools used pupils both for field work and for the construction of the school premises themselves.

S. de Leeuw quotes a statement by the chief of the Nuu-chah-nulth tribe, who characterises the location and rules of the schools attended by the children of his tribe as follows: 'Usually located on or near the top of a hill, they provided an imposing, disturbing and even frightening impression in the eyes of children unaccustomed to such places. The relatively large buildings of the residential school made their importance known far beyond and above any traditional local authority, including the Grand Chief of the Tribe. On their first day at the residential school, along with the trauma of being separated from their parents, the new students of the Nuu-chah-nulth tribes were forced to undergo physical conditions in these institutions, which were very different from those present in their family homes' (De Leeuw, 2007).

The students' experiences in residential institutions were therefore connected with an immense discrepancy between their own culture and the Euro-Canadian culture represented by the school staff. The culture shock was therefore present in every aspect of the Indian children's functioning in their new, foreign environment.

The comments by former residential school students also give testimony to the alienation and trauma experienced by children – uprooted from their traditional environments – in these institutions. This is how one student of the Kamloops Indian Residential School recalled the beginnings of his stay: 'When I got to Kamloops Residential School, it looked huge. I remember thinking about how I would fit in there when everything was so huge. When my father spoke to me, it seemed to me that his voice sounded muffled and

echoed. Everything there seemed alien and strange, you could smell the floor polish. As I climbed the stairs to the first floor, the lights went out and I was left in darkness. When I finally knelt down to pray, I disappeared under the bed, it was so high... I remember crying there and crying...' (De Leeuw, 2007).

Residential school timetables were planned in detail. In doing so, they reflected an order completely foreign to the ways of spending time in Indigenous communities. The daily schedule was subordinate to white ways of spending time and completely incompatible with the indigenous manners of functioning in the unit in reality. One must therefore conclude that the daily schedule itself (oriented towards the Euro-Canadian way of life) served as an element of assimilation (Barman, Hébert, McCaskill, 1986).

Subsequent phases of educational policy towards Indigenous peoples were reflected in transformations regarding the ways in which residential schools operated (Thornton and Todd, 2001). For example, the victory of the liberal option in the 1896 election laid the foundation for a reduction in funding for Indigenous minority schools. This is how J. R. Miller describes the aforementioned changes: 'from Sifton's time until unification in 1923, Ottawa took measures to reduce spending on residential schools, resulting in the closure of some institutions, a shift concerning the establishment of the so-called "new improved day schools", or ignoring the educational needs of Indian groups. This shift was the result of growing bureaucratic and political disappointment' (Miller, 1987).

The role of churches in the sphere of school management has been widely debated within government elite circles (Woods, 2013). The problems that existed in the sphere of residential education provided by various Christian denominations concerned various aspects of their functioning (Miller, 1996). This is noteworthy primarily for the competition between representatives of different denominations (resulting in written petitions, protests and demands addressed to the authorities). Moreover, the effects of the mission schools were meagre, disproportionate with relation to the invested amounts (Miller, 1987). It is also worth pointing out other – extremely controversial – aspects of the functioning of Canadian residential education. This is how R. M. Thomas describes the aforementioned phenomena: 'The leaders of residential schools have been blamed for various types of violence against students – mainly sexual abuse, psychological violence, and the destruction of students' indigenous culture. It has been found that the suffering experienced by students in residential schools caused them extreme emotional distress that lasted for years, often resulting in self-identity disorders, alcoholism and an inability to cope with adult life' (Thomas, 2003).

The development of Indigenous education in most northern areas of Canada was much weaker. In fact, in the 1930s and 1940s, no state schools for the Inuit were really in operation. The government's policy was that the organisation of state education for the Inuit was an unnecessary expense. In addition, there was a belief that the Inuit did not need education, as they should remain hunters or trappers. In fact, as late as 1946, the presumed objectives of education for the Inuit in government documents were to adapt them to the needs of the white people's economy. At the same time, state grants to financially support mission schools were scarce, and supported by political expectations of a steady reduction in such grants (McLean, 1995).

The actions in residential schools towards children placed there were undertaken on a large scale and subordinated to the civilising mission. They referred to a broad spectrum of activities and covered all spheres of children's lives. The specific nature of residential school life facilitated the implementation of the planned civilising programme.

One of the first and most visible aspects of the transformation, to which the children entering residential schools were subjected, was the change in their external appearance. First and foremost, it is important to note the great determination of the staff at residential schools to make Indian children look like white ones. This referred, among other things, to the matter of clothing – children were not allowed to wear traditional attire. Another of the activities was the standard procedure of cutting hair. Cutting children's hair referred, on the one hand, to hygiene and cleanliness. On the other hand, its purpose was a symbolic rejection of 'savagery' and identification with civilisation.

The phobias of residential school personnel against 'dirtiness', 'paganism' and civilisational inferiority of indigenous culture often took in form of bullying, coercion and punishments inflicted on the Indian children. Such actions also referred to the racial context, including the skin colour of Indian children. On many occasions, children experienced contempt for their appearance, hair or skin colour, etc. The personnel at residential schools openly flaunted the racial superiority of white people. S. de Leeuw quotes a statement by M. A. Roberts, who attended St. Mary's Indian Residential School from 1946 to 1957 – with relation to precisely this aspect of violence against children. This is how M. A. Roberts describes her experience in the bathroom while bathing: 'There were five showers, but without curtains separating them and when I was studying in the earlier years we had an older girl student to help us scrub ourselves. Then, usually a nun would stand in the doorway to check whether we were clean. I have naturally dark skin, so

I was always turned back. I always had to go and wash again because the nun thought I was dirty. I was turned back not because of the dirt but because of my darker complexion and she always stopped me' (De Leeuw, 2007).

An extremely significant element of the planned ethnic extermination was the language policy implemented towards the Indigenous communities. It was a product of the approach to the matters of Christianisation, acculturation and assimilation. In most schools established by missionaries in Canada, English language was taught. As previously mentioned, missionaries of some denominations also used indigenous languages. It must be said, however, that in the 19th century, no national policy existed in Canada regarding the use of English in the educational sphere. Decisions about the use of English in the educational sphere within Indigenous schools (including residential schools) were the domain of school leaders, dependent on educational administrators, and changed from decade to decade (Griffith, 2017).

However, one of the key actions taken against children from Indigenous communities in Canadian residential schools was to prohibit the use of their own language. M. A. Tappage's experiences at St Joseph's Mission School in British Columbia are recounted as follows: 'When they heard us talking in Shuswup, we were punished. We had to write on the blackboard a hundred times "I will not speak Indian ever again"'. Meanwhile, E. Brass from a residential school on the Peepeekisis reserve was beaten with a belt for using the language of his tribe at school. He recounts it as follows: 'The use of the Indian language was strictly forbidden and allowed only when relatives were visiting. The aim was to grasp the English language as quickly as possible; however, this also had a negative effect on Indian children by forcing them to reject their own indigenous language and providing them with a sense of inferiority' (Fontaine, 2017). As a consequence of such actions, rooted in symbolic and physical violence, many Indian children lost contact with the language of their own tribe, and the ability to communicate with their families and members of Indigenous communities. Many students of residential schools have lost their sense of cultural belonging and ethnic identity.

L. S. Fontaine draws attention to psychological, as well as physical violence present in residential schools – precisely aimed against the use of indigenous languages. For example, children were beaten with a belt for using their mother tongues. Another example is given by T. Fontaine attending the Fort Alexander Indian Residential School in Manitoba between the ages of 7 and 12: 'I accidentally said something in Ojibwe. The teacher thought I said something about her when a few boys laughed at my words. She screamed

and smeared my mouth with soap... I was pushed into the room behind her chair. It was under the stairs, leading to the second floor, which was used to store brushes and other cleaning materials. I don't remember how long I sat there, but it seemed like an eternity... Eventually, she let me out. Her first word was: "Tiens!" Listen!, coupled with a warning for me not to use my "wild" language again' (Fontaine, 2017). L. S. Fontaine points out that – like many other students – he was punished for using Ojibwe language.

Similar situations occurred in all residential schools. The aim expressed *explicite* by the teachers, and also the rest of the school personnel, was to break away from the indigenous language and switch to the language of the colonisers (English or French). At the same time, the indigenous language was discredited and ridiculed; treated in terms of 'gibberish,' 'devil's language,' or simply 'savage'.

To conclude this piece of reflection on selected contexts of the activities of residential schools in Canada, it is worth referring to a statement made by one representative of Indigenous communities. This is how a member of the Ojibwa tribe, T. Fontaine, assesses the effects and impact of the activities of the residential schools: 'This was the greatest deception and tragedy perpetrated on Indians and their children in Canada by the residential schools. The removal and separation of young children from their families and the manipulation of their minds to make them hate their "Indianness" was the worst abuse and the most common method used to kill the Indian in us' (Fontaine, 2010).

## **Conclusion**

It can be argued that although the history of Canadian residential schools for Indigenous minorities has gone through a number of phases (looking back to their establishment, reorganisation in 1923, until the end of their operation in the late 1960s), there was no real change in the essence of their operation (Miller, 1987). In fact, although Canadian residential schools were modelled on American educational institutions of this type, they survived longer than those in the United States (Child, 2016).

The nature of numerous aspects of the actual functioning of the residential schools provides an insight into the tremendous devastation they have had on the Indigenous population. Even in the early days of such institutions, many children would die because of illnesses, lack of care, and inadequate nutrition. The poor facilities of residential schools, combined with the violence, terror, and sexual abuse within them, caused irreversible effects on the psyche of children and young people from aboriginal communities.

In the present day, Canada apologises for the harm done to representatives of Indian and Inuit tribes. This refers to both an attempt to prosecute the perpetrators of the wrongs done to Canada's Indigenous citizens who are still alive, as well as moral and financial reparations (Roach, 2014).

The reality, however, is that no apologies or compensation can make amends to the victims (in many cases still living) of the suffering they endured in residential schools. These institutions will remain the symbols of the assimilation, discrimination and ethnic and cultural annihilation (Boffa, 2017), which took place as a part of the Christianisation and state-building processes of modern Canada.

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## **Religious education in a public school between religious particularism and general education. Comparative analysis**

**Abstract:** The basic determinant of a public school as a social and educational environment should be the promotion of social inclusion and cohesion. In most countries of the European Union, religion is a subject of school education. They adopt different models in terms of legal legitimacy, organisation and curriculum. This article presents a comparative analysis of religious education in public schools from the perspective of the relationship between religious particularism and general education. In doing so, I assume that in different countries both religious particularism and general education may be defined differently in the context of school education. In Poland, religious education at school is optional. Currently, there is an idea of introducing religion (or ethics) as a compulsory subject. Non-public schools, i.e. a school run by social, religious or private entities, have the right to implement special curricular solutions. A public school, i.e. a school free of charge and available to every student, regardless of their worldview, should conduct religious education in the spirit of dialogue and social cohesion as an element of general education.

**Keywords:** comparative pedagogy, religious pedagogy, religious education in school, general education.

## **Introduction**

From the historical perspective, religious education has formed an essential part of school education. In the past, it had a primarily confessional profile and served to convey the religious doctrine and anchor the student in a community of faith. It should be remembered that, in principle, schools were directly connected to the dominant religious traditions. The Reformation and then the Enlightenment provided the first impulses to a slow emancipation of the school system. With liberal-republican exceptions, the school system for centuries reflected the alliance of the altar and the throne. Religious education at school (I use the terms religion, religious education and religious instruction interchangeably when referring to school) served not only the intergenerational transmission of religious traditions, but also upbringing for participation in public life. In religious states, the content of humanities and social sciences curricula was saturated with religious elements. In this sense, religious education was involved in the implementation of the tasks of general education, as it was understood at the time. However, the fact is that religion, education and pedagogy are historically intertwined. This connection is pedagogical, philosophical, theological, social, cultural and political in its nature (Schweitzer, 2003).

Comparative education is one of the oldest pedagogical disciplines. From the very beginning, it was not only concerned with the comparative study of educational institutions and pedagogical ideas, but also with the typology of social consciousness, analysis of cultural and political currents, i.e. with everything that can influence the shape of education. Therefore, comparative education addresses a broad spectrum of educational issues and has a problem-based character. A simple comparison of institutional arrangements for schooling is only the vestibule of comparative education. R. Nowakowska-Siuta states: 'Comparative research serves as a multifaceted, contextualised analysis of not only education systems, as the subdiscipline was traditionally portrayed, but also of paradigms, philosophical and political discourses present in education, its history, and socio-cultural phenomena. Comparative analyses make it possible to describe not only 'how it is?' but also 'why it is as it is?', to understand the manners in which education is entangled in social, cultural, economic and political dependencies located in the logic of past events' (Nowakowska-Siuta, 2023, p. 53-54).

In the religious pedagogy, comparative education studies have their own history. According to F. Schweitzer, they were initiated at the beginning of the 20th century. In 1913, G.A. Coe in his encyclopaedic article 'Religious Education' compared the experience of religious education in

different European countries. In Germany, in 1930, O. Eberhard published a monograph titled 'Welteerziehungsbewegung' on comparative analysis towards value upbringing. Contemporary comparative studies within the religious pedagogy include not only the comparison of religious education arrangements in different countries, but variations between different types of religiosity, forms of spirituality beyond traditional religious denominations, the study of ethics as well. Comparativism thus encompasses many fields of study: pedagogy, theology, religious studies, history, sociology, economics, law (Schweitzer, 2016, p. 15-18). It should be noted that Schweitzer is also the co-author of a classic monograph comparing the multifaceted development of religious education theory in the USA and Germany (Osmer & Schweitzer, 2003).

Religious education has also been addressed by the Council of Europe and other international institutions. They grant the states autonomy to choose their organisational form and teaching model in this area, and advocate for open, diverse and tolerant education at the same time. In 2007, the Office for Democratic Institutions and Human Rights (ODIHR) published a monograph on guidelines and good practices in regard to religious practices and tolerance in schools (ODIHR 2007). In the field of international cooperation and comparativism, numerous international organisations and practical projects have been established. The development of comparativism gains the utmost importance in the discourse at the national level, which allows the latter to include issues beyond the particular interests (Jackson, 2014).

In this article, I am not able to present the historical processes which explain the status of religious instruction at school in different EU countries. However, I shall try to reconstruct the spectrum of contemporary solutions in this respect and one selected cultural and social process that appears to me to characterise – to a greater or lesser extent – the situation in most European countries, namely secularisation. In this context, I will engage in the discussion on the model of religious instruction within public education in Poland. The discussion will focus on the issue of providing religious education at school with the status of a compulsory subject. This is in fact the case in many European Union countries. However, it requires to revise not only the curricular concept, but also the understanding of the sense of religious instruction provided within the public school system. The determinant of religious education in a public school should be the balance between religious particularism and the modern understanding of general education.

## **European Union: religion at school**

In all European Union (EU) countries, religion is a subject of education provided within the public school system. The only exception is France with its own liberal-republican and colonial tradition. However, there are also exceptions within the French Republic due to the special status granted to the Alsace and Moselle regions. In the rest of the EU countries, religion is taught as part of the school system.

The issue of religious education and socialisation in a broad sense, in different religious, social and cultural settings is the subject of religious pedagogy (Domsgen, 2019; Marek 2022; Marek and Walulik 2020; Nipkow 1990). On its basis, standard studies on the comparative teaching of religion as a subject in school education have been prepared (Kuyk and Jensen et. al., 2007; Rothgangel, Jackson and Jäggle, 2014; Rothgangel, Skeie and Jäggle, 2014; Rothgangel, Jäggle and Schlag, 2016; Rothgangel, Danilovich and Jäggle, 2020; Rothgangel, Aslan and Jäggle, 2020; Rothgangel, Mechenmacher and Jäggle, 2020).

In Europe, the implementation of religious education in schools follows different rules. Below I will present a matrix of solutions. The conjunction 'or' used in the statements does not imply a disjunctive alternative, but rather points to opposite poles in an idealised manner. In specific cases, we may observe the integration of selected elements of the alternative solutions.

1) Religion in school may have different legal framework.

An example of a European country, which makes religious education in public schools compulsory at the constitutional level is Germany. The Constitution of the Federal Republic of Germany (1949) states: 'Religious instruction shall form part of the regular curriculum in state schools, with the exception of non-denominational schools. Without prejudice to the state's right of supervision, religious instruction shall be given in accordance with the tenets of the religious community concerned. Teachers may not be obliged against their will to give religious instruction.' (Article 7(3)).

In Poland, religious instruction in school is also established on a constitutional basis, but to a lesser extent in comparison to Germany. The Polish Constitution contains the particle 'may' – religion may be taught at school. Article 53(3) and (4) of the Constitution of the Republic of Poland of 2nd April, 1997 states: '3. Parents shall have the right to ensure their children a moral and religious upbringing and teaching in accordance with their convictions (...). 4. The religion of a church or other legally recognised religious organisation may be taught in schools, but other peoples' freedom of religion and conscience shall not be infringed thereby' (*Journal of Laws of*

1997, No. 78, item 483). In comparative terms – against the background of many other countries – this is still an important constitutional guarantee.

Among the members of the European Union there are also such democratic, pluralist states, which give privileged status to their dominant religious tradition, the so-called ‘Church of the Nation’, e.g. Denmark or, until 2000, Sweden. However, the societies of these countries are secularised and sensitive to the rights of those with a different worldview. In this context, Greece is an interesting case, with a society strongly attached to its own religious tradition. The Constitution of Greece of 9 June, 1975 begins with the preamble: ‘In the name of the Holy and Consubstantial and Indivisible Trinity’ (text of the Constitution: [libr.sejm.gov.pl](http://libr.sejm.gov.pl)). It states that: ‘The prevailing religion in Greece is that of the Eastern Orthodox Church of Christ’ (Article 3(1)). At the same time, the Constitution recognises social pluralism, civil liberties and guarantees freedom of conscience, regardless of religious belief (Article 13). On education, it states the following: ‘Education constitutes a basic mission for the State and shall aim at the moral, intellectual, professional and physical training of Greeks, the development of national and religious consciousness and at their formation as free and responsible citizens’ (Article 16(2)).

The education act and regulations on religious education remain faithful to the spirit of the above provision. Nevertheless, the Constitution of Greece does not speak directly about the teaching of religion in school itself (Mitropoulou, 2020, p. 59-63).

Italy, as a state traditionally associated with Catholicism, guarantees the equality of all religions in its Constitution and does not address the matter of religious education. This issue is the subject of the concordat and agreements between the State and the recognised Churches and religious associations. It should be kept in mind that the original form of the concordat were the so-called Lateran Pacts of 1929. The concordat currently in force was adopted in 1984. While religious instruction was compulsory and confessional in the Lateran Pacts, the 1984 concordat changed its character to optional. Religious instruction has maintained its confessional character and at the same time has been linked to the performance of school educational tasks (Misiąszek, 2010, p. 70; Alber and Rechenmacher, 2020, p. 88-91).

In Spain, yet another country historically associated with the Catholic tradition, the Constitution of 27 December, 1978 does not speak directly about religious instruction in school (text of the Constitution: [library.sejm.gov.pl](http://library.sejm.gov.pl)). Article 27(2) and (3) merely state that: ‘(2) Education shall aim at the full development of human personality with due respect for the democratic

principles of coexistence and for basic rights and freedoms. (3) The public authorities guarantee the right of parents to ensure that their children receive religious and moral instruction in accordance with their own convictions' The Constitution does not address the ways in which the guarantee of religious and moral upbringing is implemented. Such matter are governed by the concordat and the education law (Garcés, 2020, p. 165-171)

In a democratic state, the strongest regulations are those regulations at the constitutional level. Other forms of legal legitimacy for religious instruction are: concordats as forms of international agreements, acts on the relation of the State to particular Churches and religious associations, agreements between the State and Churches and religious associations, education acts and specific executive acts. In the EU, one may observe an entire spectrum of solutions, which does not change the fact that religion remains a subject of school education. In the face of the multiplicity of legal solutions, the challenge is to conceive a structure, which would create a balance between the requirements of a democratic and pluralistic state of law and the legitimate claims of religions to propagate their beliefs in the public space (Zieliński, 2020), also within school education (Milerski and Zieliński, 2022).

2) Religion may be taught as a compulsory or optional subject.

The subject of religion alone may be compulsory, without the possibility to choose an alternative subject, e.g. ethics, philosophy, etc. compulsory character can also be a subject block: religion (for students who identify with a particular religious tradition) and an alternative subject (for students opting out of confessional religious education).

With religion as a compulsory subject, without the possibility to choose an alternative, religious education takes the form of knowledge about religions and the exchange of experiences related to different religious perspectives of understanding and valuing the world (Sweden). Sometimes religion as a compulsory subject of a supra-confessional nature is introduced at a specific stage of education and supplements confessional religious education (some cantons in Switzerland).

If the subject block is compulsory (religion vs. ethics), we can opt out of religion and choose an alternative subject (the so-called negative choice – the pupil opts out of religion in favour of the alternative subject). This is the most common solution in most countries.

In the case of optional nature of the subject block (religion vs. ethics), we can choose religion, choose an alternative subject or choose neither of these subjects (the so-called positive choice – the student enrolls in religious education or an alternative subject). The obligatory character of the teaching

of religion or the subject block religion vs. ethics (alternative subject) is in place in countries such as: Austria, Belgium, Bulgaria, Denmark, Estonia, Finland, Germany, Greece, Ireland, Lithuania, Norway, Romania, Sweden, Switzerland, the United Kingdom.

Religion as an additional optional subject (without the requirement to choose an alternative subject) is in force in countries such as: Czech Republic, Hungary, Italy, Latvia, the Netherlands, Poland, Slovakia, Spain.

3) Religion may be taught as a confessional or supra-confessional subject.

Supra-confessional religious education is implemented, among others, in: Estonia and Sweden, and from the EU-associated countries, in Norway.

Confessional religious education is provided in most other European countries: Austria, Belgium, Bulgaria, the Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Poland, Romania, Slovakia, Scotland, Spain, Switzerland, as well as in some schools in England and Wales and the Netherlands.

In both cases, religion can be taught in accordance with various models at different levels of education, e.g. at primary level as confessional teaching and at secondary level as supra-confessional teaching (e.g. Denmark). In a given country, there may also be both types, meaning that some schools have confessional teaching and some have supra-confessional teaching, based on the authority in charge of the school, especially when the state delegates the management of schools to educational associations (e.g. the Netherlands) or delegates competences of the nature of religious education to local or regional school supervisory boards (e.g. England and Wales).

4) Religion may be taught in accordance with different teaching models.

In the case of confessional teaching, this can be an open model, focused on a dialogue with other faiths and the world from the perspective of one's own denomination, or a catechetical and apologetic model, focused on taking strong root in one's own religious community with its doctrine, worship, ethos and social teachings. In the case of supra-confessional teaching, this can be a religious studies model with principal focus on dominant tradition(s) or a religious studies model highlighting the exchange of experiences from the perspective of different forms of religiosity.

5) Religion may be taught as a subject with different curricular scope.

The teaching of religion may focus mainly on religious phenomena. It might also encompass – especially in the case of the aforementioned open and dialogical confessional teaching model or the supra-confessional model

– the whole spectrum of not only religious phenomena, but also existential, social, cultural, historical and political phenomena analysed from the perspective of religion.

6) Religion may be taught as a subject with different decision-making centres.

Religious education may be organised by educational authorities in cooperation with Churches and religious associations or by Churches and religious associations in cooperation with educational authorities (e.g. different solutions in individual German states). In both cases, the nature of the cooperation can vary – it may involve curricular, organisational and teaching matter, or only the latter two with the exclusion of the creation of curricula.

Religion could also be taught as a subject not administered ‘arbitrarily’ by the educational authorities or Churches, but by grassroot community associations running the schools, being (a large proportion of schools in the Netherlands).

### **Poland: religion in school**

In the context of the outlined matrix of solutions adopted in the countries of the European Union, I will now present the fundamental principles which currently define religious education in Polish schools.

In our country, religion has been an important element of collective identity. For the moment, I leave aside its historical context, especially the role of religion during the Partitions, the Second Republic and World War II.

The fight against religion began after 1945 with the establishment of the communist system. In a nutshell: events such as the rearrangement of the Polish borders (loss of the eastern territories and incorporation of the post-German territories on the western side), deportations and migrations of the population, unification policies, the policy of erasing cultural differences and the establishment of a socialist order were to result in the creation of a new society and a new cultural foundation. Moreover, as a result of the actions by the German Nazis, the culmination of which was the Holocaust, the Jewish population was reduced to a small diaspora. I do not elaborate here on the complex and multi-dimensional Polish-Jewish relations. As a result of the change of the borders and resettlement of population, the number of Eastern Orthodox and Protestant believers radically decreased as well. The communists wanted to make Poland a homogeneous state.

In this context, the activities of the Catholic Church became a cultural and social alternative to the domination of the communist system. On the one hand, the fact that there existed certain internal fractions within the

Catholic Church which advocated for an agreement with the communists is well known; on the other hand, we are aware of the aspirations of the political authorities to treat the Catholic Church, as well as minority Churches and religious associations, in an instrumental manner. These phenomena did not generally undermine the positive perception of the social role of the Catholic Church as the guarantee of cultural continuity. For this reason, 'Solidarność' [en. Solidarity] as a trade union and a freedom movement, partly created by left-wing activists, became closer to the Catholic Church, and the Church gave it its support. From the political perspective, this was a stimulus for the re-establishment of the 'throne and altar' alliance we observe in contemporary Poland.

The elimination of religion from the school system was of a sinusoidal character and did not take place at a single point in time. Paradoxically, the final turning point was not the year 1945, as in the end of World War II together with the incorporation of Poland into the communist bloc. More radical measures were only implemented in 1948. From this point onwards began the real and extensively planned removal of religion from schools. However, there were brief periods, such as in 1956, after W. Gomułka assumed political power, in which religious instruction in school was reinstated. It was not until the adoption of the Act on the Development of the Education and Education System (*Journal of Laws 1961, No. 32, item 160*) in 1961 that the entirely secular character of public education was imposed (Article 2 of the Act) and, consequently, religious instruction was finally removed from the school system.

With the political and system transformation in Poland, religious education once again resurfaced as a subject of school education. The change took place in 1990 on the basis of an instruction issued by the then minister responsible for education and upbringing. At the time, the decision sparked considerable public and legal controversy. The legal status of 'instruction' was put in question. In 1991, the Parliament passed a new progressive act on the education system, which legalised religious instruction in school and delegated the authority to issue the legal act in the form of a regulation to the minister. The Education System Act states: 'Public pre-schools and primary schools organise religious instruction at the request of either the parents or the pupils themselves; after reaching the age of majority, the participation in religious instruction shall be decided by the pupils themselves. The Minister responsible for education and upbringing in consultation with the authorities of the Catholic Church and the Polish Autocephalous Orthodox Church and other Churches and religious associations shall specify, by means of

a regulation, the conditions and manner in which schools shall perform the tasks referred to in section 1' (*Journal of Laws of 1991, No. 95, item 425, as amended*; I take into account later amendments concerning pre-schools).

In 1992, the Regulation of the Minister of National Education of 14 April 1992 on the conditions and ways of organising religious education in public pre-schools and schools was published (*Journal of Laws of 1992, No. 36, item 155*). The regulation was subsequently amended several times (consolidated text: *Journal of Laws of 2020, item 983*). However, the essence of the regulation has remained unchanged. The basic provisions of the regulation have been incorporated into the concordat (Article 12) and enjoy the legal status of an international agreement (*Journal of Laws of 1998, No. 51, item 318*).

I will now focus on several fundamental provisions of the regulation. However, I shall not discuss the details. These have been the subject of legal debate (Mezglewski, 2009).

Firstly, the regulation refers to all legally recognised Churches and religious associations. Polish law is especially liberal in this respect. It allows religious minorities to conduct religious instruction not only in a school setting, but also in so-called out-of-school catechetical points, usually located in parishes. After the fulfilment of certain conditions – the teacher must be employed at the school, must have a certain education, must carry out all didactic, educational and organisational duties, and must be supervised by the school management in terms of method and organisation of lessons. The grades from the so-called after-school catechetical point are included in the school diploma.

Secondly, religious education is an additional (optional) subject. Schools should provide education in ethics as well, as an alternative to religious instruction. Nevertheless, a pupil may decide whether to attend lessons of religion or ethics (up to a certain age a parent or legal guardian decides). In Poland, therefore, this is not a case of resignation from religious or ethical education, but a so-called positive choice. It is an option to choose religion as an additional subject, ethics as an additional subject or to choose neither of these subjects. Thus, it is possible to graduate from school without attending religion or ethics lessons.

It was in this context that the idea of a change of status of the religion/ethics subject block from an additional subject to a compulsory one emerged already during the first conservative party government in 2005-2007. In 2022, the idea was reintroduced to the political discourse. To date, however, the

original status has not been changed. The study of religion/ethics remains an additional subject.

Thirdly, the legal construction of the regulation stipulates that religious instruction in school is not a privilege of Churches and religious associations. It is provided at the request of parents and pupils and therefore, of the society. Religious instruction is provided at all levels of school education and, since 1999, in public pre-schools as well, for 2 hours per week. Teachers of religion enjoy in fact equal status as teachers of other subjects and are employed and paid by the school from a state subsidy.

Fourthly, religious education has a confessional character, which was especially firmly established from the legislative point of view. Firstly, curricula constitute the sole responsibility of Churches and religious associations. Secondly, Churches and religious associations have the exclusive right to delegate a teacher of religion. This right includes not only the canonical mission (granting authority to teach on behalf of the Church), but also the referral of a teacher to a particular school institution. Therefore, the principal office has no influence on what is taught and who provides religious instruction. The school authorities' supervision is only limited to matters related to the methodology and documentation of lessons.

The above legal structure has made it impossible to establish religion as an additional subject for the matura exam [exam at the end of secondary education, similar to A-Level exams in the UK or SATs in the USA]. Matura is a state examination, however, in its current form, the state cannot certify an examination in a subject, whose content it is unable to control. The situation remains a stalemate because – as I mentioned – the provisions for religious instruction are currently stipulated not only in the form of a ministerial regulation (a regulation can be amended), but also in the form of a concordat. In this case, a change would in fact require a ratification of a new international agreement. However, in the present state of the law, the question of religion gaining the status of an obligatory subject remains open. This is, then, what contemporary political discourse is concerned with.

From the legal perspective, such a solution is possible. It is essentially a question of political will of the ruling majority, as well as of social acceptance and educational changes. The latter two issues in particular reveal fundamental problems.

Firstly, in the eyes of the public, the current approach to religious instruction should be revised in a spirit of greater openness and dialogue. This is particularly important in the context of secularisation of the Polish society which has resulted in a growing number of people distancing themselves from

institutional religion and a decline in the number of students who attend religion lessons (CBOS, 2007; Milerski and Karwowski, 2021).

Secondly, the introduction of compulsory religious instruction would require organisational and curricular measures to correlate the tasks of religious education at school with those of general education and to establish a 'friendly separation' between religious instruction at school and parish catechesis. This is the problem of reconciliation of religious particularism with the mandate of general education which is implemented by public schools.

### **Secularisation as a context**

One of the hallmarks of the origins of modernity is the Reformation. Its representatives were passionate advocates for faith and religion. At the same time, they promoted ideas, which would in the future provide impulses of secularisation (universal priesthood, attributing greater value to secular life, deinstitutionalisation of the Church in the order of salvation, transfer of a part of education to secular authority, complementarity of spiritual and secular power). The key role in the philosophical realm was played by the Enlightenment. At that time, a distinction was made between the religion of the people and the religion of the enlightened. Also proclaimed was autonomy of rational thinking, which became emancipated from the influence of religion. The rationalist manifesto of the Enlightenment was not synonymous with laicisation. A famous sentence by Kant from the introduction to the second edition of the 'Critique of Pure Reason' (1st ed. 1781, 2nd ed. 1787) provides a prime example thereof: 'Thus I had to put knowledge aside in order to gain room for faith' (Kant 2001, 42, BXXX). In the post-Enlightenment era, the dialectics of the critique of religion and defence of faith continued. A classic example is the work of the young F. Schleiermacher, later dean of the Faculty of Theology at the University of Berlin, a member of the Prussian Academy of Sciences and one of the founders of pedagogy as a scientific discipline. In his 1799 phenomenological thesis (R. Otto considered it groundbreaking in the field of phenomenology) 'On Religion: Speeches to its Cultured Despisers', Schleiermacher not only diagnosed the actual nature of secularisation among educated people, but also described the essential character of religion which transcends the institutional corset. Indeed, the basis of religion is a perspective on the universe (Schleiermacher, 1995). In Schleiermacher's later work, the essence of religion becomes a sense of ultimate dependence on sacrum. A notable feature of his discourse is an apology of individual faith. Faith and secularisation are, from this perspective, a matter of individual consciousness. However, Schleiermacher, as an icon of that time, expanded

the spectrum of consideration: he broadened the perspective of individual consciousness to include consciousness of the religious community. Thereby, he brought theology and philosophy 'down to earth'. For individual and social consciousness are not only idealistic categories, they are also subject to historical processes. These processes are an empirical fact and open up the perspective of scientific exploration. Schleiermacher was a peer of G. W. F. Hegel. In his idealist philosophy, Hegel viewed the subject of history (Spirit) in its relation to the development of social consciousness, custom, ethos, social institutions, law. Similarly to an approach taken by Schleiermacher, his thought remained within a dialectical relationship between the Absolute and social reality. It remained unchanged, until the leftist idealist movement reoriented the way of thinking. It associated social consciousness with social existence. Social consciousness, and by extension religious consciousness, is a consequence of a certain state of social relations. Such an approach has opened up the perspective of research on secularisation. It was confirmed by research on the origins of modern religious pedagogy. D. Bonhoeffer, a prominent Protestant theologian, at the start of his journey as a pastor held a vicariate in the working-class neighbourhoods of Berlin. This was the interwar period, prior to the onset of the Nazi dictatorship. In his memoirs, he describes secularisation in a working-class environment. With the beginning of the 20th century, secularisation ceased to be a problem of individual attitudes to religion and the intellectual dilemmas of the enlightened classes, as it became a social fact. As a social challenge, it also provided the stimulus for the emergence of contemporary religious pedagogy (Schweitzer and Simojoki, 2005). Research distinguishes 3 phases in the study of secularisation.

The first phase is characterised by traditional approaches to secularisation which had their origins in the theories of L. Feuerbach, K. Marx, F. Nietzsche or Z. Freud. In the traditional approach, elements of individual and cultural consciousness development are intertwined. According to classical psychoanalysis, the development of a person (the individual) and humanity (the society) moves in the same direction. Correspondingly, religion becomes a temporary form of consciousness or illusion of a human, who creates an idealised image of himself or herself. It may be an image of a father reflecting early childhood trauma, cultural patterns or dreams. It is an image through which a human being can become a god and be just like a god. In sociology, the understanding of religious consciousness in the context of the social base has proved to be of significance: the class division of the society, economic stratification, the presence of dominant cultures. The

humanisation of the society, the rational and fair nature of social relations will cause religion to subside.

The second phase is related with the debate on the individualisation, privatisation and selective nature of religiosity. Its main point is the belief that religion does not die, but only takes on new forms under the changing social situation. An intrinsic role of religion is to legitimise existence and social life. For social institutions, customs, ethos to be socially recognised, they call for a semi-religious ritualisation (Bellah, 1967). Social transformations, conditioned by the mercantilisation of life, change the individual and social consciousness. They create a peculiar 'imperative of heresy', which does not negate religion, but rather allows the individual to choose and construct his or her own alternative, selective religious perceptions (Berger 1980, Luckmann, 1996). This concept is sometimes referred to as the economic theory of secularisation. With the advancement of industrialisation and urbanisation, the broader social groups, alongside the elites, enjoy the right to choose among basic consumer goods. Over time, the choice has led to a further increase in consumer choice on the part of the economy and, on the part of the individual, to an increase of expectations towards a plurality of choice and subsequently, a further expansion of the range of choice. The possibility of choice then shifted from the consumer sphere to other areas of life, world view and religious matters as well. Moreover, the possibility to make individual choices has become an 'a priori' of social and individual consciousness. As a result, institutional religion has ceased to be accepted in its entirety. Nevertheless, individual religious spirituality has remained an indispensable part of individual and social life. Meanwhile, it was noted that the pluralisation and deinstitutionalisation of religion have brought in elements of risk and uncertainty, which has become a source on which fundamentalist movements emerged or thrived. Therefore, on one end we encounter a selective religion or new spirituality, while on the other we face a religion which is conservative and exclusive. 'In present industrial societies, secularisation is a widespread phenomenon and scholars often assume that it signifies not only the decline but the total collapse of all religions (...). Secularisation marks the transformation of religion, not its annihilation' (Stark and Bainbridge, 2000, p. 339).

The third phase is a modern continuation of phase two and puts forward a proposition of a 'post-secular society', a 'religiously different' society. It has also been reflected in the religious pedagogy, which constantly seeks validation for religious instruction in schools (Franck and Thalén, 2021; Kittelmann, 2017). In 2020, the Protestant Church in Germany issued

a comprehensive memorandum on education in the context of the decline of confessional affiliation of pupils and their parents (EKD, 2020). The EKD memorandum resulted in a summary of the relationship between religious education and secularisation in different countries. Analyses in this regard were published in the 'Theo-Web. Zeitschrift für Religionspädagogik. Academic Journal of Religious Education' (2021/1).

In Poland, a discourse in this regard is also present. A classic of Polish sociology of religion wrote the following in relation to religious education: 'In the conditions of the pluralistic society taking shape, faith cannot just be a matter of birth or cultural inheritance, or based on the guarantees of the social environment. For it will be above all an expression of a conscious and personal decision, or there will be none at all. Even if this alternative is not entirely valid, as religious beliefs will always need social and cultural support, it points in the direction of an evolution of religiosity which matches postmodern society, a religiosity treated as a personal value and lived through everyday life' (Mariański, 2004, p. 423).

It is necessary, in my opinion, to recognise the sociological fact of the individual pursuit of adequate forms of spirituality. This fact may be a starting point for the modification of religious education curricula. However, the solid empirical data leave no illusions. Secularisation in its literal sense progresses. The number of students in religious education decreases. The Centre for Public Opinion Research reports that in 2010, 93% of pupils attended religious instruction, in 2018 – 70% and in 2021 – only 54%. The 2021 study involved students of the final years of secondary schools, and thus these results should not be generalised (CBOS 2022, 5-6). The data is obtained from social surveys. The Institute for Catholic Church Statistics reports in its latest *Annuario Statisticum Ecclesiae Polonia* that 82.4% of students in the 2021/2022 school year participated in religious instruction. These figures do not distinguish between primary and secondary school pupils (ISKK, 2022, p. 33). Churches provide data based on information submitted by their own organisational units, in the case of the Catholic Church – by the catechetical units of their respective dioceses. In primary schools, participation in religious education is indisputably much higher. In secondary schools, the level of participation falls significantly. It is supported by data from the education departments of the largest cities in Poland. In some conurbations, the percentage of pupils in religious education at secondary level is around 50% or below. For the construction of religious education, it is not only important to make statements about new forms of spirituality. Obviously, these forms may be included in the curricula. However, new forms of spirituality have

one feature – they must be practised. The public school is not an appropriate place for the implementation of religious worship, also in terms of alternative forms of spirituality. For this reason, the teaching of religion at school has to face the growing phenomenon of secularisation (Milerski, 2021; Milerski and Karwowski, 2021).

### **General education and religious particularism**

There is no single definition of general education. In the humanistic tradition, general education is defined as one which goes beyond the acquisition of utilitarian competences. It is illustrated by a maxim, the authorship of which is attributed to various people: General education is what remains in us even when we forget all that we have learned at school. General education refers to the creation of cultural personality, a specific personal structure as a structure of meanings and values. It allows one to independently value and understand one's own existence and external reality. It is a grid of categories which organises other competences acquired in the process of education and socialisation. In the sense of cognitive and constructivist theories, the structure of meanings and values can be understood as the structure of cognitive schemas. However, what these concepts have in common, is the recognition of the subjective and active role of the individual in the construction of this structure. Another common quality which unites these concepts: an ethic of mutual appreciation, the common good and the search among differences for what is shared (EKD, 1994; Nipkow, 1990).

Viewed from this perspective, religious instruction can be a part of general education. However, the problem is that religious education cannot dominate general education. Religious teaching is conditioned by discourses from various perspectives, which it should either integrate or criticise (Doms-gen, 2019, p. 23). Nevertheless, it does constitute a part of general education. In a public school, religion can be one of the elements creating the structure of our personality. Education of the future, which takes seriously both the religion with its claim to exclusivism, as well as the public school's commitment to general education, needs to find a balance, and perhaps even – to place religion under the responsibility of the public school as a school for everyone, which serves the collective interest.

The definition of the relationship between general education and religious particularism is a derivative from the legal arrangements about which I wrote in section 2. Nevertheless, the theory and practice of religious education in school depends on a number of historical, social and political factors.

Let's take Poland, for example. If we analyse the core curricula of religious education of different Churches and religious associations in Poland, a broad curricular spectrum, confessional as well as dialogical character of religious education in public schools seems to be apparent. However, social research proves that theoretical assumptions and practice are two different areas of reality. Religious instruction at school is understood as a 'component of catechesis as a whole' (Rogowski, 2016, p. 197). One may venture to argue that such a nature is present in religious instruction in some countries which originated from the socialist bloc, e.g. the Czech Republic and Slovakia. 'In the Czech Republic, religious instruction has an explicitly confessional character' (Muchova, 2016, p. 97). The practice of religious education is of a similar nature in countries associated with the Catholic tradition, including Italy and Spain, as well as in Orthodox Greece. In Spain, similarly to Poland, the goals of religious education encompass religious particularism with general education. Religious education performs the tasks of the school by definition. Nevertheless, it is in fact understood as a different form of catechesis (Garcés, 2020, p. 178-179). A similar situation is present in Italy. Despite the subordination of religious education to the tasks of the public school and the distinction between religious instruction at school and parish catechesis, it remains actually under the authority of the Church. (Alber and Rechenmacher, 2020, p. 98-99). In both countries, the option to abstain from religious education at school still remains. Overall, it can be said that, despite differences in details, there exists a similar model of religious instruction and its relation to the tasks of the public school in the aforementioned countries.

The Baltic states, especially Estonia, are influenced by Scandinavian models. It is an open religious education. In Estonia, there is interconfessional religious instruction. The concept is illustrated by the change in the main goals of religious education in school (Figure 1).

**Figure 1:** Main goals of religious education in Estonia

<b>Religious education advisory programme (1997)</b>	<b>State syllabus for religious education (2010)</b>
to provide knowledge about Christian culture	to provide knowledge about different religions
to create a message for participation in the life of the Church	to support the development of pupils' worldview and critical thinking

to create prerequisites for joining church	to support development of student's moral development
to support understanding between confessions and to understand people with other religious views	to develop social awareness and responsibility, an open identity and readiness for dialogue across different religious and non-religious beliefs

Source: Schihalejev, 2014, p. 87.

In Scandinavia, religious instruction forms a part of the school curriculum and is a component of general education. In Finland, religious education is both confessional and dialogical. The study of religion – referring to Anglo-Saxon terminology – is a study from the perspective of religion, ‘from religion’, as well as a study ‘about religion’ (Ubani and Tirri, 2014, p. 110-111). In Sweden, the study of religion has the name ‘knowledge about religion’ and is, in its nature, above individual denominations. Moreover, the subject is evaluated by educational authorities. They consider it as an equal part of general education (Osbeck and Skeie, 2014, p. 246-249).

The status of religious education in the Netherlands and the United Kingdom, here limited to England, is rather different. On the one hand, it is a result of the historical and social understanding of the importance of religious education at school, as well as – or perhaps above all – the organisation of education and its financing. To put it briefly: in the Netherlands pluralism is considered to be of the utmost importance, which consequently delegates education to different entities managing the schools. Therefore, there is a diversity of teaching models in practice (Geurts, Avest, ter and Bakker 2014, p. 181-184). A personal note: During my study visit at one primary school in Uden in the Netherlands, the lessons had a Christian, biblical character and were taught by the class teacher (so it was not a catechist) every day, in the first hour of school. However, this does not exclude the reverse situation, that in the neighbouring school the religious instruction may have a form of knowledge about religions, existential challenges, society and ethos.

An equally complicated system can be found in England. There as well teaching of religion in school depends on the type of school. They are divided into schools maintained by state funds and those sustained by private funds. ‘Within the group of state-maintained schools, there is a diverse mosaic of institutions, with their funding varying from full to partial’ (Zielinski, 2016, p. 343). Religious education in schools funded by the state is diverse. This differentiation depends on local education boards. The curricular spectrum is broad, but emphases may be placed on confessional or,

in certain multicultural regions, supra-confessional issues. In each case, religious instruction is part of the overall tasks of the school (Gates and Jackson, 2014, p. 78-86).

Religion constitutes a part of general education in Austria, Germany and Switzerland. Each of these countries has their own unique conditions. These are all federal countries divided into regions, cantons or federal states with a high level of autonomy. The situation – in the case of the Catholic Church – is complicated by the plethora of concordats signed with individual federal states (Warchołowski, 1997). Religious education at school is compulsory in the form of a religion/ethics subject block. Religious education has a confessional and dialogical character (Rothgangel and Ziebertz, 2016). It can be supplemented by additional religious formation classes, which are held in parishes, or – as it is currently the case in some Swiss cantons – as ‘religion for all’, an additional subject, organised additionally during one school year. However, these classes are institutionally separate from religious instruction at school. In some federal states in Germany it is possible to take the end-of-high school (Abitur) exam in religion. The common feature of religious education in these states is their versatile emphasis on: religious knowledge, confessional identity, understanding cultural and social reality. Religious education at school is conducted with two principles in mind. The first is the principle of dual responsibility of Church and State with regard to education and, consequently, cooperation in this regard (Rothgangel and Ziebertz, 2016, p. 120). The second is the principle of acknowledging social reality. The content and delivery of religious education at school must take into account the challenges of a pluralistic society, as well as the processes of secularisation (Schlag, 2016, p. 277).

## **Conclusion**

Comparative studies show that European countries face similar challenges. Religious instruction at school is dependent on the understanding of its relationship to parish catechesis and the tasks of the public school in terms of general education and the promotion of an ethos of the common good. It is my belief that educational and church policy makers need to redefine not only the theory, but the practice of religious education in public schools as well. The redefinition should incorporate the tasks of the public school, a holistic understanding of church education with its religious particularism and, simultaneously, the need to pursue the mission of the public school in terms of general education, the recognition of social pluralism and the idea of the common good. It is essential to take secularisation seriously as a context

of socialisation and education. The idea of introducing compulsory religious education in Poland needs to have its curriculum reconsidered in the spirit of dialogue and ecumenism, agreements between educational authorities and Churches on the scope of the curriculum, a clear distinction between religious instruction at school and parish catechesis and – perhaps – some reduction in the amount of course hours. A critical review of the present state of the matter does not serve to discredit the teaching of religion, but rather its defence as an essential part of general education in the public school.

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## **Is the existence of special schools for deaf students under jeopardy? Selected aspects of international research in the field of deaf education**

**Abstract:** In this article, an attempt is made to analyse selected factors influencing the current situation in the education of children with hearing impairment in Europe and worldwide. The attention is focused on exploring the importance of the impact of modern technology in providing children with hearing aids, hearing implants, undertaking early rehabilitation intervention and in the light of international education policy as a foundation for inclusive education. The key questions sought to be answered concern the dilemma of whether deaf/hard of hearing pupils need a special school or whether its existence is in jeopardy.

**Keywords:** deaf pupil, hearing aid treatment, early intervention, special school, inclusion, education policy.

### **Introduction**

Hearing impairment is one of the most common birth defects in the world. Statistics from the World Health Organisation (WHO) indicate that more than 34 million children worldwide are affected by severe and profound sensorineural hearing loss. The prevalence of permanent hearing loss in newborns is approximately 0.5 to 5.0 per 1 000 infants worldwide, and in some low- and middle-income countries it is even higher (Olusanya, Neumann and Saunders, 2014). Among the Polish population, the number of children with hearing impairment between the ages of 1 and 7 ranges from approximately

0.5% to 2%. All these children should have access to early rehabilitation and education in the most favourable conditions, where their needs are met, as well as the opportunities to develop their potential provided. Until the last decades of the twentieth century, two systems of education for children with hearing impairments have operated alongside each other in the world: the segregationist and the inclusive one. What has changed in the recent years, what transformations have taken place in the rehabilitation and teaching of deaf and hard of hearing children? What has led many researchers, therapists working with children with hearing impairment to preach a solution to deafness and an end to special education facilities for deaf pupils? An attempt to answer these questions is made in the article.

### **Early diagnostic and rehabilitation intervention, modern hearing aid treatment technologies**

Over the past two decades, one can observe the intensive development and progress in the field of medical sciences, e.g. in audiology, otorhinolaryngology and otosurgery. The associated dynamic changes in the use of modern technology expressed in the design of new generation hearing aids (HA) and increasingly sophisticated cochlear implants (CI) have prompted the release of hitherto unknown possibilities, which are changing the face of hearing disability, including the deaf community itself. The progress has created a new situation, which the whole world of deaf education has been confronted with.

Early identification of hearing impairment in children enables effective implementation of medical and rehabilitation procedures, as well as preventive ones. Universal Newborn Hearing Screening (UNHS), also known as the Early Hearing Detection and Intervention Programme (EHDI), is a strategy, which allows congenital deafness and hearing loss to be identified at a very early stage (Bałanda and Skurzak, 2009). Initially, hearing screenings were orientated towards newborns at risk of hearing deficits and they gradually became a standard procedure. Programmes to identify hearing impairment in young children have developed significantly over the past 10 years, and the indicators of their implementation continue to grow worldwide. Poland has been a forerunner in this regard. The first projects implementing the newborn hearing screening programme (NHS) were implemented in Poland more than 25 years ago, and the universal newborn hearing screening programme has been a standard since 2002, as a result of the work of Great Orchestra of Christmas Charity Foundation (Szyfter, Wróbel and Radzi-szewska-Konopka 2008). Currently, universal newborn hearing screening

has been implemented in most countries of the European Union, as well as in the USA, Australia and developed Asian countries. In 1998, a consensus was signed in Milan to conduct this type of screenings in Europe. A similar situation can be observed in the USA, where the average age of hearing defects identification has decreased from an average of mid-three years old (in the second half of the 20th century) to only the second, third month of the child's life. Currently, approximately 95-100% of newborn babies in the USA who leave the hospital have a screening done on the first or second day after birth. In 1993, this amounted to only 3% of newborns (Raimondo, 2011; Lenihan, 2010). The situation is similar in Poland, with the introduction of the Universal Hearing Screening Programme increasing the hearing defects detection rate to approximately 99% (Topczewska-Cabanek et al., 2015). However, in most LMICs (low- and middle-income countries) with low- or middle-income economies, newborn hearing screenings (NHS) are not common and are only available to certain populations (Yoshinaga-Itano, Manchaiah and Hunnicutt (2021).

A retrospective study of hearing-impaired children who have undergone universal hearing screening conducted in 2020, when analysed using electronic databases from multiple countries around the world (30 reports from 14 populations, including 7,325,138 infants screened by the UNHS), showed that with the introduction of the UNHS, the identification of hearing impairment had occurred earlier and interventions were initiated before 6 months of age, resulting in significantly improved developmental outcomes in early childhood, including the development of better language skills compared to children who were diagnosed later (Nelson and Bougatsos, 2008).

Providing hearing impairment devices with assistive listening to younger and younger children is progressing. Research data from various authors indicate that while in the United States, for example, there were only about 10% children among the 5,000 people fitted with hearing implants in 1990, by 2002, 50% of the 45,000 implanted patients were children. (Christiansen and Leigh, 2002). It is difficult to determine unequivocally how many children around the world have received cochlear implants so far, data from various sources differ. According to estimates based on voluntary reports from the manufacturers of registered devices of the US Food and Drug Administration (FDA), since December 2019, nearly 736,900 cochlear implants have been implanted worldwide. It is generally estimated that around half of cochlear implant recipients are children. In the US, nearly 118,100 devices have been implanted in adults and 65,000 in children.

The execution of early intervention programmes, including the provision of hearing aids, as well as hearing implants, to young children, have serious implications for the development of their language and communication skills and their subsequent acquisition of literacy (Yoshinaga-Itano, 1999). Most researchers support these findings, but note the large individual differences in the obtained effects (Tomblin et al., 1999; Svirsky and Neuburger, 2004). As Christine Yoshinaga-Itano, Vinaya Manchaiah and Cynthia Hunnicutt (2021) point out, despite the rich scientific literature, reports on UNHS from around the world, the analyses made have some limitations and cannot be considered to be fully representative. In particular, the quality of the included studies varied greatly and the conditions for randomised controlled trials were not always provided.

It is significant to note here that UNHS begins with screening at the newborn stage, followed by audiological monitoring to diagnose and fit amplification technology in the form of hearing aids, implants. However, the main intervention takes place during rehabilitation at home (the involvement and participation of parents is essential in the process) and should then be followed by a special education or inclusive system. Where are the best conditions for that? There is not a straightforward answer, given the incredibly varied abilities and needs of children diagnosed with hearing impairment and the conditions in which their rehabilitation takes place. Attention is drawn to the existence of a critical period for speech and language development, after which the child may not be able to master these skills to a high level. This knowledge has resulted in reducing the lower age limit for implantation to below one year, to fall within the period of greatest brain plasticity. The first pioneering surgeries in Europe for new-generation hearing implants in children before the age of one were carried out in 2009 in Poland under the direction of Prof. Henryk Skarżyński at the International Hearing and Speech Centre in Kajetany, and in Freiburg, Germany, under the direction of Prof. Roland Laszig, and in Pamplona, Spain, under the direction of Prof. Manuela Merique (PAP/Health Market, 2009). The validation of such early implantation has created unprecedented conditions enabling children with congenital deafness to have almost natural hearing development. However, research focused on the language skills of children with cochlear implants (CI), although very optimistic, showing a distinct increase in competence in most children, found it to be at a significantly lower level compared to the language skills of their hearing peers. Some researchers have also pointed out that the rate of these beneficial effects has slowed with the increase of linguistic complexity (Ertmer, Strong and Sadagopan, 2003; Schorr, Roth and

Fox, 2008). At this point in time, it is already known that the effectiveness of cochlear implants depends on many different factors and the assessment of their effectiveness must always be considered in an individual manner. Researchers from Europe, the United States, Australia have invariably emphasised the age of the child at the time of surgery, the duration of sensory deprivation, overall developmental potential, possible coexisting conditions including anatomical/physiological and technological factors, and family involvement in the hearing and speech rehabilitation of the child. The severity of the influence of these variables, which may have a significant impact on the effectiveness of hearing implants, should be, as mentioned above, considered individually. Recently, as the age of hearing-impaired children eligible for implantation has been significantly reduced in Europe and the United States, studies have been initiated aiming at the comparison of the receptive and expressive language skills of children who received cochlear implants before the age of 1 with the language skills of children who received implants between the ages of 3 and 4 years old. It has been determined that early implantation has a beneficial effect on the development of auditory function in children with hearing impaired since birth and that their speech development based on the auditory pathway is similar to that of an (age-matched) hearing child (Miyamoto et al., 2008).

An indication of how complex an issue we are addressing in these considerations is the fact that one can quote many other researchers emphasising that numerous studies on the impact of cochlear implants have focused solely on the clinical assessment of their effectiveness, derived from data relating to: speech detection threshold (SDT); speech reception threshold (SRT), the lowest speech signal intensity at which the examinee correctly repeats 50% of the test elements; degree and threshold of speech discrimination. The dilemmas to consider include if the measure of success is the ability to repeat the sounds, words, phrases, sentences heard by the child fitted with the implant, the development of passive and active verbal speech in the office of the audiologist and speech and language therapist for the hearing impaired. A desired outcome described in the research, perceived in this manner, can be confirmed by the vast majority of the CIs (hearing implants), as well as the greater value of purely auditory training-based methods over other methods of teaching deaf children. It should be noted here that regular intensive auditory-verbal training supplemented by multidisciplinary rehabilitation adjusted to the needs of the child does not always lead to the expected results in terms of full development of language and speech of the child with hearing impairment and the ability to socialise with hearing peers, to participate

spontaneously in play, to engage in conversations which bring satisfaction to hearing and deaf children. Research indicates that children with CI spend less time interacting socially in comparison to their hearing peers and face numerous difficulties in social interactions with their peers, and there are also problems related to the acquisition of social skills (Bat-Chava, 2001; Da Silva et al, 2022; Punch and Hyde, 2011).

The differences in the functioning of children with hearing implants observed in the studies may take multiple forms. Thus, there are children who benefit spectacularly, can function similarly to hard of hearing children (Tai and Lutman, 1994) and hear much better than prior to receiving an implant. There are also those who experience severe difficulties communicating under the adverse listening conditions often found in regular schools (general background noise, multiple people speaking at the same time, others speaking too fast). Other children, on the other hand, can only perceive ambient sounds and do not gain much benefit from the implant in oral communication with their hearing peers. Communication and socialisation skills of children with hearing implants have been shown to improve at different rates, but they depend on each other. Better communication is often associated with better socialisation of children. Deaf children whose speech is not clear and comprehensible enough for their peers may be rejected or ignored by their friends/colleagues, which affects their ability to socialise (Christiansen and Leigh, 2002; Ouellet and Cohen, 1999). With systematic hearing and speech rehabilitation, the progress is always observed, but at times the slow rate of development of the benefits of auditory implantation means that the child needs additional support in the form of non-verbal forms of language communication for harmonious overall psychophysical, emotional and social development (Bat-Chava, Martin and Kosciw, 2005)

The changes which have been brought about as a result of the achievements of new technologies and medical advances in recent years are immense, but the greatest success of this revolution is not, in my opinion, assistive listening devices as such, but the recognition of the importance of early diagnosis, rehabilitation (early intervention, support and stimulation of development) of the hearing impaired child, as the stepping stone, which becomes the foundation for all the developmental and educational success of the deaf child and later the deaf/hard of hearing adult. This does not change the fact that some children, as a result of early medical and therapeutic interventions, can fully benefit from hearing, they can speak, understand phonic and written language, communicate, learn without sign language support, nonetheless others need to have permanent assistance. There are

also those for whom sign language will be their primary form of communication, even though they use the newest generation of hearing aids and implants. In other words, among deaf children, CI and hearing aids users, extreme variation can be observed in the achieved effects of hearing and speech rehabilitation with the same level of involvement of professionals and parents. This phenomenon is observed in Poland, as well as in Europe and the United States. The result achieved by one child or a group of children is not necessarily replicated in a study of another group of children who have also undergone initial medical and rehabilitation intervention. The results can vary radically, as a large number of factors affect the final result.

The lack of spectacular successes in the development of phonic language, verbal speech is sometimes wrongly and unfairly, in my opinion, viewed as a failure. Using sign language is not a failure, it is an alternative way of developing the language of a person with a hearing impairment. Using the developmental potential offered by sign language, creating cultural values with sign language in the deaf community is evidence of extraordinary possibilities. It is worth mentioning at this point deaf children of deaf/hard of hearing parents, whose first natural language is sign language. They also use hearing aids and implants and are subjected to hearing and verbal speech rehabilitation interventions. Cochlear implantation for these children is a growing occurrence in the US and western European countries (Davidson, Lillo-Martin, Chen Pichler 2014). In this way, conditions are created in which these children can grow up surrounded by two languages, thus fostering sign-phonic bimodal bilingualism in children (Nussbaum et al, 2003; Ohna, 2004; Archbold and Wheeler, 2010; Kotowicz, 2017; Kobosko, 2018). Taking a prospective approach, it must be acknowledged that the challenge for the education of hearing-impaired children is to accept the diversity of this population and to responsibly incorporate the specific, individual needs and abilities of each child into pedagogical and social activities (Mudgett-DeCaro and Hurwitz, 1997).

### **Equal access to education, inclusive pressure on the education of hard of hearing/deaf children**

The end of the 20th and the beginning of the 21st century is marked by the blooming idea of social integration and inclusive education all over the world. It has also shaped the process of education for children with hearing impairment. In Europe and worldwide, we can generally observe two attitudes towards the education of hearing-impaired pupils: in special and regular institutions. Education in special schools is seen in the category

of segregationism, whereas in regular schools it is perceived in accordance with the model of inclusive education, the teaching and upbringing of pupils with and without disabilities together. In the case of children with hearing impairments, this seemingly simple division has many variations and is implemented in different ways in Europe and around the world. The educational policies constituting the foundation of inclusive education derive from socially important international declarations, conventions, treaties, which aim to shape a society that is open and accessible to all, regardless of the limited abilities of individuals, a society without discrimination, respecting individual differences. While the right to education was first articulated in the 1948 UN Universal Declaration of Human Rights (Article 26. on the general right to education), the 1960 UNESCO Convention against Discrimination in Education unequivocally and firmly obliged countries to address the real, externalised and hidden barriers to education that lead to unequal treatment, of persons with disabilities as well (Article 1). Out of the 105 countries which are parties to the Convention, about a half ratified it. An important document for educational policy relating to the issue of the education and upbringing of children and youth with disabilities is also the 1989 UN Convention on the Rights of the Children (a document in force in all countries of the world except for the USA), where two articles are dedicated to the right to education and a separate article related to the education of children with disabilities. They oblige signatories to recognise the 'special needs of a disabled child' and to provide a free of charge assistance to 'ensure that the disabled child has effective access to and receives education (...) in a manner conducive to the child's achieving the fullest possible social integration and individual development'. (Article 23 of the Convention). The UNESCO Education for All programme, launched in 1990 at the World Conference in Jomtien, on the other hand, called for taking steps to '(...) provide equal access to education to every category of disabled persons as an integral part of the education system' (Article 3, §5).

An important milestone in the efforts for inclusive education became the provisions of the World Conference on Special Needs Education: Access and Quality, held in 1994 in Salamanca, Spain. It advocated for the formation of the school community as an inclusive social environment for all pupils. The final statement urged the countries to 'adopt as a matter of law or policy the principle of inclusive education' obliging regular schools to respect and accept individual differences of pupils and create conditions to provide effective support for their learning at school, taking into account the particular, individual, special needs.

In 2006, the right to inclusive education was established in the UN Convention on the Rights of Persons with Disabilities, which was ratified by 181 countries across the world. Article 24 of the Convention obliges the signatories to ensure an inclusive education system at all levels which enables '(...) The full development of human potential and sense of dignity and self-worth, and the strengthening of respect for human rights, fundamental freedoms and human diversity'. It also provides the conditions for 'The development by persons with disabilities of their personality, talents and creativity, as well as their mental and physical abilities, to their fullest potential'. Also, the Committee on the Rights of Persons with Disabilities, which monitors the implementation of the Convention on the Rights of Persons with Disabilities, emphasises that States, signatories to the Convention, are obliged to '... take steps to recognise inclusive education as a right and grant all pupils with disabilities, regardless of their personal characteristics, the right to access inclusive learning opportunities in regular education, with access to support services as required' (Committee on the Rights of Persons with Disabilities, 2019, p. 10).

The aforementioned global activities promoting the educational rights of persons with disabilities are complemented by initiatives and processes implemented at regional and state levels. Individual countries are taking appropriate steps aimed at transitioning international obligations into national legislation.

The analysis of the Global Education Monitoring Report (GEM 2020) concludes that, worldwide, 16 countries mention inclusive education in their general education legislation, while among the countries surveyed, 79% have separate legislations regarding the education of specific groups of people with disabilities, which are the responsibility of the Ministry of Education of these countries. In the field of education and upbringing, the principle of subsidiarity applies, which means that each state is responsible for its own education system. The legislations differ in the extent to which they address the right to education for all, including persons with disabilities.

Therefore, the common denominator for individual countries are the ratified treaties, declarations under which various solutions concerning the education of people with disabilities, including hearing impaired people, are applied and interpreted.

In the case of education of deaf/hard of hearing and hearing impaired children, we can therefore observe solutions in European Union member states such as: full inclusion of all students with hearing impairments in regular schools (Italy, Spain, Portugal, Iceland, Greece, Norway); the use of two

separate educational systems of so-called 'mainstream' and special education based on separate legislation (Belgium, the Netherlands, Bulgaria, Romania, Latvia); the combination of a variety of activities and services resulting from common legislation for all children, taking into account their special needs (Belgium, the Netherlands, Bulgaria, Romania, Latvia). mainstream and special education based on separate legislation (Belgium, the Netherlands, Bulgaria, Romania Latvia; combining in the educational space a variety of activities and services resulting from common legislation for all children including special educational needs of children with disabilities (including children with hearing impairment) in mainstream education and special education (Denmark, Germany, France, Ireland, Austria, Finland, the United Kingdom, Iceland and Liechtenstein and the Czech Republic, Lithuania, Poland, Slovakia, Hungary) (Global Education Monitoring Report Team, 2019; Przybysz, 2005).

*Mainstreaming* has a long history as a controversial topic in the education of deaf and hard of hearing students. This can also be observed nowadays in, for example, the very meaning of the term segregationist and inclusive education. In the Global Education Monitoring Report (GEM 2020), titled 'Inclusion and Education. All Means All', which presents the education policies and regulations of particular countries in the field of inclusive education, we find comments revealing tensions around the inclusive education of deaf/hard of hearing children. The World Federation of the deaf signalled comments made by four international organisations of the deaf community highlighting that 'special schools' are perceived in terms of segregation, while special schools for hard of hearing/deaf children do not mean education which 'excludes' or segregates. The best quality education is provided in an educational environment where every child can be fully included, for example by providing a full sign language environment, whether it is a special school or a fully accessible regular school, where the support of a sign language interpreter is provided. States-parties should provide options of different types of schooling to simplify the choice. Australia and Germany did not regard segregation in special schools for deaf children as negative in relation to parental choice. Similarly, in the US, Denmark, Finland, Norway, Sweden, with the sign language interpreter is not uncommon in regular schools in these countries.

The World Federation of the Deaf strongly emphasises that deaf people are citizens of the world, but consider themselves as a linguistic and cultural group with very complex natural languages, with a wide variety of national and regional sign languages which develop within the Deaf linguistic

community. In general, each country has its own national sign language; some countries have more than one sign language, e.g. in Finland both Finnish sign language and Finnish-Swedish sign language are used, in Switzerland Swiss German, Swiss-French and Swiss-Italian sign languages coexist. Therefore, language rights are important for deaf people and should not be considered solely within the disability paradigm. At this point, it is worth drawing attention to the provisions relevant to the situation of deaf, sign language users, which were introduced with the adoption of the UN Convention on the Rights of Persons with Disabilities (2006), where the issue of linguistic and cultural rights was incorporated into the human rights framework. Article 24 (Education) sec. 3: stipulates, inter alia, '(...) States, Parties shall take appropriate measures, including: (...) Facilitation of the learning of sign language and the promotion of the linguistic identity of the deaf community, (...) the education of persons, and in particular children, who are blind, deaf or deafblind, is delivered in the most appropriate languages and modes and means of communication for the individual, and in environments which maximise academic and social development'.

### **Do special schools for deaf pupils have a reason to exist or is their existence under jeopardy**

Legislative actions observed worldwide, which highlight the value of inclusive education for children with disabilities and support it, as well as the progress in early diagnostics, rehabilitation using modern technologies (digital hearing aids, hearing implants) which provide access to the world of sounds including speech, have resulted in a change with relation to the educational environment for children with hearing impairment. There is a clear shift of focus in the education of these children from special schools to regular schools. The number of deaf and hearing impaired students receiving education in general education classes with hearing students has increased significantly (Eriks-Brophy and Whittingham, 2013; Luckner and Muir, 2002). In the course of the analysis, which was conducted in 49 European Union member states, it was shown that in 68% of the countries surveyed, more than 50% of hard of hearing/deaf and hearing impaired students, on average, attend regular schools (Institute for Statistics UNESCO 2018). Verhaert, Willems et al (2008) who surveyed 229 children in Belgium diagnosed with hearing impairment during a hearing screening showed that 85.4% were being educated in regular schools. Data from the UK shows that 78% of hard of hearing/deaf children of school age attend mainstream schools (CRIDE, 2015). In the USA and Canada, this number ranges from 80 to 90%

(Gallaudet Research Institute, 2004). Over the past 15 years, the number of students with hearing impairments in special schools has decreased by more than 50%. A consequence of this situation has been the closing of special schools. A recent study by the *Consortium for Research into Deaf Education* (CRIDE) and the *National Deaf Children's Society* (2022) found that the number of facilities for hard of hearing pupils in England has decreased by around 8%. A similar trend is observed in many countries.

Hearing-impaired children fitted with excellent hearing aids, hearing implants and those whom early rehabilitation intervention has enabled to achieve high results in the development of auditory function as well as verbal language can be successfully educated in regular schools. However, it is already known that this is not feasible in every case. It appears there are some hard of hearing/deaf children all over the world who have significantly limited verbal communication skills (caused by a number of factors), which severely hinders their learning in mainstream schools (Thoutenhoofd, 2006). They experience a number of educational and social failures, also resulting from inadequate learning conditions and a failure to meet their language communication needs (Holmström and Schönström, 2017). As early as 1994, in Salamanca, the UNESCO World Conference on Special Needs Education: Access and Quality, with the participation of representatives of ninety-two governments and twenty-five international organisations stated: 'Owing to the particular communication needs of deaf and deaf/blind persons, their education may be more suitably provided in special schools or special classes and units in mainstream schools' (Salamanca Declaration (sec. 21). This position is reflected in the UN Standard Rules on the Equalisation of Opportunities for Persons with Disabilities. The general commentary to the UN Convention on the Rights of Persons with Disabilities No. 6 (2018) on equality and non-discrimination in section 65 states: 'To ensure equality and non-discrimination for deaf children in educational settings, they must be provided with sign language learning environments with deaf peers and deaf adult role models.'

In the context of the aforementioned statements, it is worth highlighting the issue of the determinants of identity formation and its significance for the self-esteem and psychological well-being, sense of self-esteem of deaf children, whose education and upbringing takes place only in the environment of their hearing peers. Researchers addressing this issue (Chapman and Dammeyer, 2017) point out that the majority of children, even with profound hearing loss, with whom hearing and speech rehabilitation has started early, with maximum use of the auditory pathway through the provision of

hearing implants, develops their speech very well and it is well received and socially understood in the setting of a mainstream school. It may lead to a situation in which a deaf young person with a hearing implant is perceived as a hearing person. Being seen in this way, while at the same time perceiving themselves as deaf, might create a certain amount of tension, especially for those who feel that they are deaf, but also consider hearing to be important and desirable in their lives. They are then often in a situation where they come to the conclusion that they belong neither to the 'deaf world' nor to the 'hearing world.'

In addition, pupils in regular schools are often perceived as being able to hear well due to their hearing aids or implants, and therefore little attention is paid to their needs resulting from difficult listening conditions (noise, echo, speech rate of others), which make it impossible to understand what the teacher, as well as other pupils, are communicating. The fact that occasional learning opportunities are very limited (despite the use of a hearing aid or implant) cannot be ignored. Hearing children learn language naturally, without a moment's pause, by hearing the conversations around them. The vast majority of these conversations are not directed at them, and yet they do benefit from them, thereby acquiring knowledge about the surrounding reality. The situation is not the same for children with hearing impairments. Even if they recognise oral speech very well in one-on-one interactions, they hear and understand the speech of others differently when they are in a group or when the communication is not directly addressed to them and takes place in uncomfortable acoustic conditions. How much are they missing out on from what reaches a well-hearing child, 20%, 30%, perhaps more. Even the most perfect hearing aids or implants do not provide full immersion in a phonetic language. The claim that if you can hear, you can understand is not true. Hearing aids, implants potentially offer a good chance for the speech development of a child with a hearing impairment. However, success in the development of speech, language communication is very individual and depends on many factors, which sometimes are difficult to determine.

High diversity among the population of hearing impaired children observed today calls for understanding and greater flexibility in meeting their special educational needs. Conditions of inclusive education are not optimal or most beneficial for all hard of hearing/deaf children. Many problems have been identified with both educational and social inclusion due to communication difficulties experienced by deaf children. It is even suggested that at times deaf children may be excluded from educational and

social opportunities if education is provided in a mainstream institution (Jarvis, 2002). Despite the use of modern technology in rehabilitation and education, a large percentage of deaf students require sign language support. As mentioned earlier, sign language in education is treated differently in various countries around the world. One can observe approaches in which:

- Sign language is virtually absent from the curricula of special schools for deaf children, as well as regular schools. The approach stressing the importance of verbal language in the education of all children with hearing impairments is strongly emphasised. Sign language is allowed, but treated as a kind of therapeutic option: Belgium, Hungary
- Sign language is used in the education of hard of hearing/deaf students only in special schools: Poland, Bulgaria, Germany, Greece, Ireland, Portugal
- Sign language is used in special institutions for hearing-impaired children, as well as in special divisions or units of regular schools: Finland
- Sign language is available in regular education with the support of interpreters as well as in special education for hearing-impaired children and youth as a full-fledged with the phonic native language as a tool for linguistic communication in the course of schooling: Netherlands, United States, Sweden, Croatia, Macedonia, Norway (Leeson, 2006; Wheatley and Pabsch, 2010).

The presence of sign language in regular schools is made possible by the participation of a sign language interpreter in the educational process, who should be more than just a middleman between the teacher, the peers and the deaf student. An interpreter is effective when he or she is able to explain details and, by doing so, provide deaf students with the transmission of information, presumably the same as that addressed to hearing students in class. However, research shows that despite the presence of an interpreter, deaf students are not able to fully engage in classroom discussions, asking questions, and providing answers. It turns out that teachers in inclusive classrooms rarely, or never, pose questions to deaf students. Deaf children are often unable to be active in discussions because not all questions and answers from other students are translated, and they are not able to follow all translations. Communication between the teacher and the deaf pupil tends to be one-directional and of a low standard, as does the communication with hearing peers, which clearly indicates a genuine low level of integration/inclusion. It appears that integration mediated by an interpreter leaves out

any challenges and opportunities related to the specific abilities and learning potential of deaf children, leaving them constrained by the limited forms of participation in education and social relationships with their peers (Grimes and Cameron (2005).

In spite of the strong pressure for inclusive education for children with a range of disabilities, there is a continuous debate on how different education systems around the world address the problem of educating children with hearing impairments, including their special needs in terms of communication, language acquisition and social-emotional development, within which they could reach their full potential. Neither extreme is reasonable, as –particularly for children with hearing impairments – there is no single approach which is best for everyone. It is therefore desirable to start from the premise that the education of children considered to have special needs should be viewed as a part of a larger process of school development, which can have different dimensions. While the achievements in early diagnosis and intervention in the form of providing children with cochlear implants, hearing rehabilitation mean that there are now many more deaf children who communicate through speech, it has also become clear that for the foreseeable future there will always be children in need of a bilingual approach incorporating sign language to reach their full potential. More than 90% of children with hearing impairment are born into hearing families. Despite early diagnosis and intervention, the hearing defect limits their full access to language in early childhood, as hearing parents need time to learn to communicate with their child. Such language deprivation can have lasting effects even in the school years, affecting not only learning outcomes, but also critical identity development, peer relationships and mental health. In addition, it was pointed out that for many young people with hearing implants there are certain contexts in which the ability to use sign language becomes an added value, especially in the middle stage of education. They are also more flexible in their approach to communication and talk about the communication needs of the situation rather than specific language practices. They do not have the dilemma of choosing either/or between spoken and sign language approach. A better understanding of the nuances and variability of language use seems to be indispensable in planning the educational journey of an individual child with a hearing impairment (Wheeler et al., 2007; Wheeler et al., 2009). Teachers need to think prospectively about the child with a hearing impairment as a whole, consider the language needs and the trajectory of development of deaf children, so that, depending on their individual needs and abilities, they are able to find the best educational setting. For many of

these children, special schools are the necessary educational environment to help make their developmental and educational opportunities more equal. In the bimodal and bilingual approach to the education of hearing impaired children and youth, advocated by the majority of special schools, the need to adapt to the changing focus of the individualised approach to the education of hearing impaired, hard of hearing/deaf children is apparent. The main goal becomes to maximise educational opportunities for children and youth with hearing impairments and to ensure that sign language remains an essential part of education and a source for meeting the diverse communication and social needs in the different environments of life of children (Lillo-Martin et al., 2014). A special school can provide good conditions for achieving this objective – a school in which a continuum of developing linguistic communication in both spoken and sign language becomes possible in one place. Within the same space, deaf children would then have the opportunity to develop two languages, which are seen as the norm and part of life. This would also alleviate the tensions experienced by parents trying to choose between spoken and sign language (Swanwick, Hendar et al., 2014).

In mainstream education institutions, the conditions and specificities of the development of hearing-impaired children are rarely understood and accounted for comprehensively. Teachers tend to make the faulty assumption that hard of hearing/deaf pupils are the same as hearing pupils, except that they simply cannot hear. They assume that if they remove communication barriers, (i.e. providing a sign language interpreter for the pupil in school) they can teach their deaf children just like other hearing children. A Rochester Institute of Technology study of deaf students aged 5 to 18 conducted in Australia, the Netherlands, England, Scotland and Rochester, in the state of New York, contradicts this belief. In fact, as it turned out, one could claim that there are some differences between deaf and hearing students in the way their memory works, the way they organise their knowledge, and the learning strategies they use. The analyses carried out point out that deaf pupils do not always learn and think in the same way as hearing children, but also their stock of knowledge about the world, the way it is acquired and communicated to others is different from that of their hearing peers. For example, the visual-spatial memories of deaf people are formed on a higher level than those of their hearing peers. Sequential memory, on the other hand, is not as good. Therefore, the perceived learning difficulties in these children should not be linked, as it often is the case, mainly to their lower language competence. Failure to adapt teaching strategies to the specific characteristics and developmental needs of these children can accumulate difficulties, which

ultimately show that these pupils are at a lower level in terms of learning outcomes. Special education teachers have a specialised background and understand the nature of not only the individual but personalised approach to the learning process in a small class, but also the need to modify the existing mainstream curriculum in the school so that its implementation becomes accessible to hard of hearing/deaf pupils. There is a need for knowledge of the specific development of children with hearing impairment and greater flexibility to respond to the needs of each student in different types of special, inclusive, regular schools (Marschark and Spencer, 2011).

It should also not be ignored that schools for deaf children are not only an educational option, but are the only beneficial place for many of them, certainly not for all of them, but for many indeed. This is because special schools are the least restrictive environment for a deaf child, an environment rich in fully accessible, visual-spatial language without any restrictions. In the era of pressure for inclusive education, it is worth to realise the fact that for many of these children, this specialised educational environment can be more beneficial than standard education in regular schools. Special schools for deaf pupils are able to provide the necessary visual learning space and a supportive environment for language development. No other educational environment can offer such spontaneity and freedom of communication as that found in schools for the deaf. It provides the opportunity for social relationships, friendships without barriers, without feeling misunderstood or unaccepted. The child is not overlooked or ignored in a deaf school, does not have to explain why he or she is deaf, does not have to worry about being laughed at by peers for speaking differently. Schools for the deaf provide a real community for many deaf children. Pupils in these schools develop emotional, social and cognitive skills that are key to the fulfilment of human potential and identity.

## **Conclusion**

I will conclude by returning to the question posed in the title about the future of schools for the deaf and whether their existence is in jeopardy. The rapid development of technology and the strong medicalisation of problems related to hearing loss have coincided with the global idea of integration and the aspirations of societies for inclusion in the area of education for children with hearing impairment. This has unfortunately set in motion a trend towards the closure of special schools. We are currently witnessing the above, but it will not be, in my opinion, a progressive process. However, deaf education pedagogues have to shake off the pressure of medicalisation

and appreciate the importance of early intervention in the broadest sense, of rehabilitating the young deaf child in their family environment. Indeed, clinical research on deaf children with hearing implants has been intellectually dominated by exposing the effectiveness of cochlear implantation as a treatment for profound hearing loss and the results relating to testing of hearing and speech. Expected are the presentations of analyses of factors so far mostly overlooked, namely psychological and neurocognitive factors, which may be responsible for enormous individual differences and variability in the effectiveness of cochlear implants. The hearing impaired child cannot be treated narrowly, only from the perspective of effective auditory training and speech rehabilitation, or, on the other hand, only from the perspective of sign language. One cannot limit oneself to the view that if you hear then you will understand and all problems will disappear. On the other hand, sign language cannot be seen as a remedy for all errors and delays. Access to sign language and its development are not in contradiction with the possibilities offered by new technologies, which greatly facilitate speech learning, but do not by themselves restore the ability to speak. Children who are assisted by the latest devices enabling auditory perception of the world of sounds do not cease to be deaf. In the process of their development, they need diverse rehabilitative, pedagogical, psychological and social support. A good place to meet the developmental needs of many deaf children is precisely the special school. However, it must, in my opinion, liberate itself from the stigma of a special school for children, pupils with educational failures, and become an open school for children with hearing impairments. It must become a bilingual and bicultural educational environment. It needs to step out into the open by proposing new models of education which do not distinguish between an inclusive and a segregated model, where spoken language and sign language approaches are treated as mutually exclusive. There is a need for a pluralistic view of early acquisition of both spoken and sign language, a gradual parallel development of language and communication skills ensuring that children with impaired hearing can learn without limitations. A pragmatic and responsive approach to the language communication needs of the child will provide for a more heterogeneous view of the teaching-learning process in hard of hearing and deaf children and the place in which it would happen.

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## **Global challenges and local solutions: A cross-country comparative perspective on teaching legal English**

**Abstract:** The established role of English as a legal *lingua franca* has led to a growing demand for legal English education, presenting a unique set of challenges. Although these challenges are global, they call for local solutions, tailored to the specific needs of students. This article draws on available accounts of teaching legal English at the tertiary level in the UK, the USA, Israel and Poland to offer a cross-country perspective on these challenges and the adopted strategies. The article concludes that legal English students form a highly heterogenous group with varying needs. This state of affairs affects the organization of legal English courses, the materials used, and the responsibilities of teachers.

**Keywords:** comparative education, legal English, language teaching, LSP.

### **English: the legal *lingua franca***

In the era of rapid globalization, the role of English as a *lingua franca* has been widely acknowledged across diverse sectors, notably in science and technology (Björkman, 2013, p. 6; Ammon, 2001, p. V). Parallel to this, English has also gained significance in the specialized and complex world of legal settings, becoming a legal *lingua franca* (Drolshammer and Vogt, 2003, p. 51; Mattila, 2006, pp. 240–252). Its special status is evident in the context of many international organizations, where English may be used for the purposes of negotiating, creating, and adjudicating law. For instance,

in the European Commission, English is the *de facto* drafting language for legislative proposals (Biel and Doczekalska, 2020, p. 185). The influence of English, however, extends beyond institutional settings. It has also become a cornerstone in international commercial transactions and day-to-day legal activities, thereby affecting businesses and individuals alike. Everyday legal transactions—be they property dealings, employment contracts, or personal matters such as divorces and adoptions—often take on international dimensions (Northcott, 2008, p. 35). Consequently, these activities are frequently conducted in English, regardless of the native language of the parties involved. Sometimes even when none of the involved parties are native English speakers, English may still be the language of choice (Triebel, 2009, pp. 147–148), thus serving as a vital linguistic bridge that facilitates mutual understanding.

Although the role of English as a legal *lingua franca* has its undeniable benefits, it also introduces a set of unique challenges that cannot be overlooked. For legal professionals worldwide, a thorough knowledge of legal English is essential, not merely for understanding and drafting legal documents, but also for effective communication in cross-border negotiations and disputes. Since language nuances and legal terminology can differ significantly across jurisdictions (Tiersma 1999: 109), legal communication carries an increased risk of misunderstandings or misinterpretations. One reason for this is that legal professionals may interpret English words through the prism of the legal system they are most familiar with, thus associating it with a set of legal effects that may differ from those found in the legal system represented by another party. If, then, legal communication is to be successful, all the parties concerned may have to acknowledge the challenges that stem from using English and work together towards overcoming them. A crucial first step involves developing sensitivity to the differences between the legal systems represented, a skill that is usually acquired gradually.

Legal education has also responded to the rise of English as a legal *lingua franca*. Increasingly, law schools around the world are introducing courses in English legal language and international law to better prepare their students for the globalized legal landscape. In doing so, they seem to be heeding V. Gessner, A. Hoeland and C. Varga's (1996: xv) sound recommendation that "legal education in a period of rapid globalization, must enable future practitioners to deal with foreign legal systems". In this regard, at least three factors emerge: first, raising awareness of the differences between legal systems; second, imparting legal knowledge about these differences; and third, equipping students with the foreign language skills needed to

communicate about these disparities. The question of how this objective may be best achieved, given the often heavy demands placed upon students by law schools, remains an open one.

It is evident that the global rise of English in law presents unique challenges that require innovative solutions. These challenges, while shared globally, call for solutions that are localized, tailored to the specific needs of students who operate within their unique legal and educational contexts. Universities worldwide may reasonably be expected to strive to meet those needs by adopting approaches to legal English teaching that ready their students for the professional and academic challenges ahead. The diverse range of practices in legal English teaching forms an intriguing research topic. Exploring it may help not only to understand the nature of legal English instruction across different locations, but it may also provide a source of inspiration for legal English educators in other regions.

Keeping this in mind, the aim of this article is to delve into how universities from different countries have locally responded to the global dominance of Legal English by offering tailored legal English courses. We will explore, compare, and analyze the varied strategies and methods employed in teaching Legal English across an array of legal systems and educational contexts. Through this comparison, we aim to provide a richer understanding of the potential challenges and best practices in teaching legal English in a rapidly globalizing world.

### **The challenge of teaching legal English**

The focus of any legal English course primarily revolves around legal English, but this term is not devoid of ambiguity. Its meaning may overlap with that of other terms frequently used in this context, such as *language of law*, *language of the law*, and *English for law*. A. Trosborg's (1997, p. 20) understanding of *legal language* seems particularly fitting as a starting point for this article, as it serves as an overarching term that covers: language of the law, language of the courtroom, language in textbooks, lawyer's communication, and people talking about law. From an educational perspective, *legal English* may also denote the practice of teaching and learning the English language of law. In this sense, the term may be equated with "English language education to enable L2 law professionals to operate in academic and professional contexts requiring the use of English" (Northcott, 2009, p. 166). However, the term itself does not preclude an even broader understanding, whereby legal English encompasses English language education aimed at enabling English speakers—whether English is their L1, L2, L3, etc.—to operate in law-related

academic and professional contexts. Given the potentially confusing ambiguity of the term in its educational sense, alternative designations have also been proposed, notably *English for Legal Purposes*, which can further be subdivided into *English for Academic Legal Purposes* (EALP) and *English for Occupational Legal Purposes* (EOLP). For the purpose of this paper, *legal English* will be used to encompass both meanings discussed above. When referencing other researchers, the term EALP will also be employed as appropriate to respect their terminological choices.

The teaching of legal English is largely shaped by its distinctive characteristics. In terms of semantics, A. Jopek-Bosiacka (2010, p. 87–130) highlights precision, indeterminacy, specialization, complexity, and conservatism as key features of legal discourse. Approaching the topic from a different angle, H. Matilla (2018, p. 122–127) outlines the following attributes that distinguish legal English from ordinary language: frequency of definitions and tautology; information density; abstraction, hypothetical nature, neutrality; frequency of references; organized text structure and formalism; sentence complexity and terminological abstrusity.

While legal English as a whole is complex, its specialized terminology is often especially challenging to master. In P. Dwużnik's (2021, p. 84–85) study, both legal practitioners and legal English teachers identified specialized legal terminology as the primary obstacle in learning legal English. A major reason for this seems to be the system-bound nature of legal English terminology, i.e. the fact that legal terms belong to specific legal systems. Such systems may differ greatly even when the same national language is used to express them, as evidenced by the differences in terminology used in Scots law and English law (Bromwich 2013: 16–17). Consequently, while legal English is a practical and useful concept, one can argue that there exist multiple legal Englishes, each associated with a distinct legal system<sup>1</sup>. This boundedness sets legal terminology apart from the terminologies of many other disciplines. For example, in chemistry, terminology is largely standardized and international (Michta, 2018). It would be nonsensical to suggest that a chemical bond is tied to American chemical terminology rather than Scottish chemical terminology, as the underlying concept is supranational in nature and the term may travel well from one language to another due to perfect equivalence. However, as G.-R. de Groot (1996, p. 155) asserts, "An international legal technical language is almost wholly lacking. It only exists to the extent that certain legal areas have become 'internationalized':

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<sup>1</sup> For a different understanding of *legal Englishes* see Williams (2008).

this is particularly true for international law and European Community law.” Another reason why legal English terminology presents challenges is its correlation with a system of concepts. When attempting to understand a particular term through a definition, one often encounters new terms that are more fundamental than the term being defined, referred to as its primary terms (as discussed in Michta, 2022). These new concepts carry meanings that are specific to the legal system and can lead to further terms, thus forming an interconnected terminological network where nodes depend on one another. As a result, the process of unraveling the meaning of a single term may necessitate an extensive exploration of an entire set of related terms.

The unique nature of legal English creates specific challenges for both teachers and students. For teachers, the process of teaching legal English may be fraught with difficulties due to close links between legal language and legal knowledge, the latter requiring additional effort to become familiar with. As pointed out by V. Bhatia (1989, p. 223), “of all the specialist disciplines that an ESP practitioner may be called upon to design and teach ... perhaps in none of them the need to integrate the specialist content and the language used to communicate it is greater than in Law”. For this reason, the challenge of teaching legal English is not purely linguistic in nature. On the contrary, it also requires a good understanding of the legal concepts that this specialized language aims to express. Hence, the challenge of teaching legal English calls for a dual expertise in law and language teaching, a combination that may not be readily available. Students may also struggle with the dual challenge of learning legal English due to a variety of factors, including their general language skills, their knowledge of law as well as the contexts they intend to use legal English in the future. Given that numerous combinations of such factors can exist, thus creating unique learning paths for each student, a standardized, one-size-fits-all approach to teaching legal English is likely to be insufficient.

### **Exploring teaching through the lens of comparative education**

Researching legal English inherently engages with both language and law, thereby intertwining the fields of linguistics and legal studies. This unique intersection, coupled with the multifaceted nature of teaching legal English and the varied contexts in which it occurs, creates a compelling focus for research in applied linguistics and its adjunct discipline, educational linguistics (Spolsky, 1978). Yet, an additional dimension can be gleaned by adopting the lens of comparative education, a field that eponymously deals with comparisons in educational contexts. Given this article’s objective—to

conduct a cross-national examination of legal English instruction—the inclusion of comparative education seems particularly fitting, as this approach facilitates an enriched understanding of the diverse pedagogical strategies and cultural contexts involved in teaching legal English.

Having evolved over the course of 200 years, the field of comparative education has seen a range of interpretations reflecting its complex array of research approaches (Hayhoe, Manion and Mundy 2017; see Phillips and Schweisfurth 2014, p. 7–14 for an overview). M. Debeauvais (1985, p. 859) deftly captures this variety, asserting that “Comparative education covers a vast field which does not correspond to any strict normative definition”. Consequently, debates regarding the scope, identity, and disciplinary status of this field remain ongoing.

Under a broad definition, comparative education examines “two or more educational operations to discern their similarities and differences” (Thomas, 1990, p. 1). Here, ‘educational operations’ encompass any activity related to teaching and learning. However, the term often extends to include analyses of education systems in different countries. Hence, research in this field invariably acquires an international focus. G. P. Kelly, P. G. Altbach, and R. F. Arnove (1982, p. 505) emphasize this international focus by suggesting that comparative education is “a field devoted broadly to the study of education in other countries”. Many scholars such as E. Epstein (1994, p. 918) have echoed this sentiment, while J. H. Williams (2022, p. 223) has gone as far as to assert that comparative education “might be construed as the triumph of a discipline that seeks to understand things in the context of the world over those who more or less explicitly see their pedagogy as trying to understand things primarily in the context of ‘home’”. The emphasis on juxtaposing various aspects of educational systems across various nations has been underlined by several scholars, with the term *comparative and international education* sometimes synonymously used with *comparative education*, further underscoring its global orientation.

J.H. Williams (2022) explores comparative education through five perspectives, namely Contextual, Comparative, Cultural, Critical, and Constructive. Two of these lenses—contextual and comparative—are particularly important here. The contextual lens stresses the importance of context and the ways in which it affects (and is affected by) educational phenomena. Since the interactions between the context and educational practice are reciprocal, focusing only on the latter may only yield a fragmented picture of the educational situation. Crucially, due to the embedding of educational practice in its context, the same practice may well work differently in another

context. The comparative perspective of comparative education goes to the core of this field. It involves the systematic examination of similarities and differences between various aspects of education in different countries.

Apart from its fundamental aim to produce new knowledge, comparative education also offers valuable practical insights, benefitting practitioners, including teachers. By examining education systems and practices in various countries, educators may enhance their pedagogical approaches (Luschei and Castañeda 2022). Comparative education serves as a starting point for teachers to reflect on key issues such as classroom organization, curriculum design, pedagogical practices, and student diversity, ultimately improving their teaching (Hayhoe, Manion and Mundy, 2017, p. 2). Furthermore, comparative studies inform teachers about the effectiveness of various pedagogical options, resources, and curricula, enabling them to make informed decisions that positively impact student learning outcomes (Adamson, 2022).

While the preceding discussion did not concentrate on the teaching of any particular content, it seems reasonable to conclude that the lens of comparative education can effectively elucidate the diverse educational settings in which legal English is taught. The strength of comparative education lies not only in its focus on juxtaposing different educational situations to highlight their differences and similarities, but also in its emphasis on the importance of context when analyzing educational practices. Although comparative education cannot replace the insights from applied linguistic approaches into legal English teaching, it can indeed complement them, providing a more comprehensive understanding of the field. This broadened perspective may prove valuable not only for researchers delving into the complexities of legal English teaching, but also for practitioners and students in the field. A key benefit, it seems, lies in the opportunity to learn from the experiences of others, critically reflect on one's own pedagogical practices, and enhance one's own teaching practice.

### **Aims and methodology**

Drawing on existing accounts of how legal English is taught at the tertiary level in selected countries, this article aims to offer a cross-country perspective on the challenges encountered and the solutions adopted. Although the subject of legal English teaching has received attention in a variety of publications (see the next section), many of these provide a local perspective, often restricted to a single university or a country. As a result, comparative research into the practice of legal English teaching is limited.

Yet, such a comparative approach is valuable. It not only facilitates a broader understanding of the specific problems faced by legal English teachers and their students, but also offers an opportunity to learn from the variety of strategies employed in different pedagogical contexts.

To address the existing gap in research, this article aims to build on selected studies in this area, analysing and synthesising them. We hope that by offering a critical perspective on the current practices in legal English teaching, we will be able to delineate what has been accomplished from what still remains to be done in this area. We also hope that our review, while summarizing existing knowledge, will also offer a synthetic account that presents new perspectives on the problem in question<sup>2</sup>. Since many of the problems described in the studies selected for the review are practical, the study may also have clear practical implications and recommendations. As such, this paper may prove useful to academic teachers, tutors, and trainers responsible for teaching EALP or EOLP as well as to those involved in curriculum design for EALP or EOLP in tertiary education institutions and beyond.

In order to capture diversity in teaching and learning contexts as well as geographical regions, our review includes four countries: the UK, the USA, Poland, and Israel. These were selected based on the assumption that the teaching of legal language would vary between countries where English is spoken as a *de facto* official language and those where it is not. Furthermore, the chosen countries represent different legal systems, which we anticipate could influence teaching strategies and the challenges presented in legal English instruction. The USA and the UK are English-speaking countries rooted in the common law tradition. Israel, while not an English-speaking country, bears a significant resemblance to the British legal system due to historical ties between the two countries (Deutch, 2003, p. 126). Finally, Poland, which is a civil law country, offers a perspective where law students learn legal English as part of their foreign language training.

To select articles for our comparative review, we employed two screening criteria: a practical screen and a methodological screen. In the practical screen, we focused on articles that discussed the teaching of legal English at the tertiary level in the selected countries. We sought publications that provided insights into the challenges faced by legal English teachers and the solutions they adopted. Our aim was to include studies that specifically addressed the context of legal English teaching rather than general English language instruction. In the methodological screen, we sought articles that

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<sup>2</sup> See Boote and Beile 2005 and Maxwell 2006.

presented a clear methodology or approach to studying legal English teaching. We prioritized studies that provided a descriptive account of legal English teaching. Yet we supplemented our discussion with insights from additional studies. We begin our review by examining approaches to legal English teaching on a country-by-country basis.

### **Local perspectives on teaching legal English: An overview**

Our literature review regarding the teaching of EALP and EOLP begins with the UK, a country with a wide range of legal English courses offered, addressing the diverse needs of both law students and legal professionals. This rich offering of courses reflects the fact that British universities cater not only to the needs of UK citizens (many of whom have English as their L1) studying for a degree in law but also to the needs of a large number of foreigners who come to the UK to pursue a degree in law or to learn legal English in an English-speaking country.

Insightful case studies regarding teaching legal English in the UK context are provided by J. Northcott (2009) and P. Howe (1993). J. Northcott (2009) gives an overview of courses offered by Edinburgh University's Institute of Applied Language Studies; namely, (1) English for Legal Studies, (2) English for Lawyers and (3) English for the LLM. Due to its international reputation, this higher education institution attracts students from diverse backgrounds with varied needs and expectations. In order to cater to these needs, the institute offers courses that are customized to suit specific target groups. English for Legal Studies is aimed at law undergraduates and recent graduates from civil law countries, English for Lawyers is designed for legal professionals with some experience in legal practice, whereas English for the LLM (Master of Laws) focuses on English for Academic Legal Purposes and is particularly suitable for those who intend to enrol in a postgraduate law program in English. P. Howe (1993), on the other hand, focuses on planning a pre-sessional course in EALP for undergraduate L2 students to assist course designers and teachers. Both researchers agree that in order to understand common law and its language students need to improve their language skills but also broaden their historical, political, and sociological knowledge (Howe, 1993, p. 150; Northcott, 2009, p. 174).

Northcott categorizes potential groups of learners, outlining the challenges involved in meeting their needs (Northcott, 2009, p. 169–174). She finds that courses in English for Academic Legal Purposes may appeal to the broadest spectrum of students. This diverse group includes undergraduates studying in common law-influenced legal systems (where English is not

L1), UK law undergraduates, LLM students, students pursuing diploma of law courses, law undergraduates from civil law countries as well as US law schools. For the first subgroup, developing their reading comprehension and writing skills is crucial. Since case reports and statutes constitute key genres in their education, a genre-based approach may effectively address their needs. Northcott also suggests that corpus-based methods and findings from the area of computational linguistics may prove useful. However, she notes that they may have to be adapted for the course purposes as the needs of linguists, legal students and lawyers may not be the same<sup>3</sup>. As for reading comprehension skills, a wide range of resources are available for both classroom and as self-study use<sup>4</sup>, while teaching writing presents a challenge as skills most materials are developed with L1 speakers in mind and resources suitable for EALP contexts are scarce<sup>5</sup>. However, some of these materials are adaptable to meet the needs of L2 students as well<sup>6</sup>. For another subgroup of potential students, i.e. UK law undergraduates, the same methods as the ones suggested for the first subgroup apply provided that students have at least a basic proficiency in general language. If proficiency is lower, non-specialist EAP courses supplemented with language materials aligned with students' specific law courses may prove more suitable. LLM students will often face dual challenges, as they may struggle due to purely linguistic problems (as they often are L2 English speakers) as well as due to their lack of familiarity with the UK legal system. Initially, these students may need to learn the intricacies of the legal systems covered in their law programs. They may also need to acquaint themselves the Socratic method used in seminars in common law countries. With its emphasis on individual participation and contribution, this method may be new and stressful, especially to students from Asian cultures, which tend to prioritize collective rather than individual efforts<sup>7</sup>. Thus the teacher's task will involve developing students' confidence so that they can actively participate in this seminar format (Northcott, 2009, p. 175–176).

As for students enrolled in Diploma of Law courses, their needs focus on the same areas as those of undergraduate law students; and thus the

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<sup>3</sup> See Dongmei and Li 2015, Hafner and Candlin 2007, and Kemp 2018 for potential applications of corpus data in legal English teaching.

<sup>4</sup> See Badger 2003, and Langton 2004.

<sup>5</sup> See Candlin, Bhatia, Jensen and Langton 2002.

<sup>6</sup> See Strong 2003 for details on the CLEO (Claim Law Evaluation Outcome) method that aids in problem-question essay writing.

<sup>7</sup> See also Feak and Reinhart 2002: 9 for an account of the US teaching context.

teaching methods are similar. These Diploma courses, these originally designed for English non-law graduates wishing to embark on a career in law, are now increasingly attracting students from Asia, who come to the UK to attend this type of courses. Since Diploma of Law courses aim at teaching substantive English law as well as English for Academic Legal Purposes, the courses will cover similar areas and use similar approaches as undergraduate law courses discussed earlier. Undergraduates from civil law countries constitute yet another subgroup and again this group may be heterogeneous as it may include those preparing to study English or American law and those aiming to understand the Anglo-American legal systems, especially contract law. A course for this target group is usually an English for General Legal Purposes course, i.e. it is topic-based covering areas similar to those included in an undergraduate law program with legal terminology being presented within the context of the common law system. A challenge pertinent to a course aimed at such a diversified group is predicting the contexts the students may need to use Legal English in, which may vary depending on the countries of origin and their professional needs. A possible solution might be to employ comparative law methods, where essential elements of, for instance, a contract under English law are presented and asking students to compare these with the law in their own countries. Such methods may be found in *English for Contracts and Company Law* (Chartrand, Millar and Wiltshire, 2009), which is geared towards European law undergraduates. This kind of approach allows for the integration of the necessary socio-cultural aspects that affect all legal systems (Northcott, 2009, p. 173).

Another course type is English for Lawyers. Such courses are in high demand as insufficient proficiency in English both in terms of receptive and productive skills constitutes a career obstacle and may limit business opportunities. Similar to Business English courses, they focus on practical communication skills such as giving presentations, making phone calls, negotiating, and writing letters and reports. The target audience for this type of the course mainly includes lawyers working in an international environment as well as judges and prosecutors from continental Europe who may need to improve their legal English skills for Continuing Professional Development requirements (Northcott, 2009, p. 173). The LLM course offered by the Institute for Applied Language Studies at the Edinburgh University is designed for students studying for their Masters in Law degree in the US and the UK as well as in LLM English language programs run in other European countries (Northcott, 2009, p. 171). The design of such a course will be discussed in the

section devoted to the US context, using C. Feak and S. Reinhart's (2002) account of a pre-sessional program at the University of Michigan.

As for another influential common law country, i.e. the USA, the situation is slightly different as law is not taught there at undergraduate level (Northcott, 2009, p. 176). This leads to US law schools to emphasize skills-based courses as an assumption is made that students have already mastered fundamental academic skills. The target audience for legal English courses here includes both L1 and L2 speakers of English who need an introduction to American law course covering very context-specific legal issues (Northcott, 2009, p. 176). Undoubtedly, L2 speakers may require more assistance both in legal language as well as the peculiarities of the US legal system. One solution to this problem may be attending a pre-sessional language program at an American university aimed specifically at those admitted to law schools, such as the one offered at the University of Michigan (Feak and Reinhart 2002, p. 7).

After analysing students' entry-level knowledge and skills, the course designers concluded that a general EAP program would not adequately prepare students for the US law program, especially in terms of honing reading comprehension and writing skills. In contrast to continental or UK law programs based on textbooks, in an American law school studying consists in reading and analysing cases<sup>8</sup>. The fact that both the content and the language used in these cases will probably be new to students does not make students' task any easier. Additionally, students are often required to write research papers following specific academic legal writing styles, which may be challenging for students unfamiliar with such conventions. Despite their diversity, students often share a common characteristic: they enter the program with a strong legal background as they graduated from law programs in their countries and often with field experience. However, they may be concerned that their linguistic skills may not be sufficient to meet the demands of a law school. To cater to students' needs, the tailor-made pre-sessional course comprises four interrelated components: Processing Legal Materials (this component design was based on M.A. Lundberg's (1987) study contrasting novice and expert legal readers), Academic Legal Writing, Interactive Listening and Speaking, and Researching Legal Issues, which aim to build or strengthen key competencies in the area of law (Feak and Reinhart, 2002, p. 11). The program's distinguishing features include a focus on authentic

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<sup>8</sup> Specific strategies for dealing with legal case reading are presented in Reinhart 2007.

academic legal English materials, legal experts as instructors for some classes, the effective use of specially tailored in-house materials, a workshop in the Language of Law, visits to law classes as well as films and field trips (Feak and Reinhart, 2002, p. 18–20). As this type of program combines linguistic skills with subject-area knowledge, collaboration between language teachers and law instructors is necessary for achieving optimal outcomes<sup>9</sup>.

The needs of L2 speakers wishing to study in undergraduate or graduate programs in the UK or the USA may differ from those of law students in other countries. Moreover, numerous factors, including cultural, historical or sociological contexts, may affect these needs<sup>10</sup>. Due to space limitations, this paper will discuss the approaches to teaching legal English in two non-English speaking countries, namely, Israel and Poland. The former has a deep-rooted affiliation with the English common law system, while the latter operates under a civil law framework.

In the case of Israel, there are clear historical and cultural ties to the English common law system. Recently, the influence of the American legal system has grown with American cases being cited as support for Israeli decisions and serving as an inspiration for Israeli Supreme Court judges (Deutch, 2003, p. 127–128). These close ties result in the increased importance of the English language both for law students, legal professionals, and academic legal research. Students taking an EALP or EOLP in a non-English speaking country may need to communicate in academic situations as well as in varied professional contexts. In her study, Y. Deutch argues that while Israeli institutions of higher education recognize the importance of specificity in language instruction, a quick review of the materials used in legal English courses revealed that there was no unified methodology and many of the materials used were selected haphazardly (Deutch, 2003, p. 126). Another challenge is the fact that all legal English courses in Israeli higher education institutions “are limited in duration”, which makes it difficult to address students’ short-term (academic) needs and their long-term (occupational) needs simultaneously. As approaches vary and seem not to be optimally suited to cater to the needs of students, Y. Deutch (2003) examines students’ needs and offers some feasible solutions.

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<sup>9</sup> The need for collaboration between legal subject instructors and language teachers to achieve best pedagogic results is also discussed in Deutch 2003, Feak and Reinhart 2002, Howe 1993, Łuczak 2012, and Sierocka 2017a, 2017b.

<sup>10</sup> See Deutch 2003 for an account of Israeli context, Ng 2009 for a description of the situation in Hong Kong, and Morrison and Tshuma 1993, Northcott 1997 for more details on legal English education in Zimbabwe.

Given the complex network of factors determining students' needs and the numerous constraints, both institutional and individual, a possible solution could involve focusing on those needs that align with the requirements set by both academic instructors and legal practice as opposed to an approach taken by some Israeli law schools' English departments which emphasizes all four language skills equally (Deutch, 2003, p. 133–134). According to Y. Deutch (2003, p. 134), reading comprehension should be prioritized as it prepares students for dealing with their university assignments and future work-related tasks. Interestingly, this recommendation concurs with those made by the UK and US course designers mentioned earlier. If one agrees to prioritise reading, there is another key decision to be made regarding course design namely selecting the legal English genres that would reflect the texts students are likely to encounter while at university or in the professional lives. Y. Deutch's analysis reveals that students and professionals have different priorities. In an academic context, articles are considered to be the most important genre, whereas in legal practice legal documents rank highest in terms of importance, a difference that implies a possible mismatch between short- and long-term goals of legal English education. A solution here could involve giving priority to legal articles and books, supplementing them with court decisions and legislation (Deutch, 2003, p. 136–137). Ideally, the curriculum should follow that of the legal courses and focus on legal concepts already acquired by students, allowing them to utilize their background legal knowledge (Deutch, 2003, p. 140). Writing is another skill that is vital for legal practitioners. In law, "language is medium, process and product" (Maley, 1994, p. 1) and therefore, a lawyer is responsible for ensuring that the language they use is clear and unambiguous. However, Y. Deutch (2003, p. 135) argues that teaching legal writing at the university level is an unrealistic task and as such should not be incorporated into the curriculum due to the complexity of legal writing, time constraints of legal English courses, and the potential lack of subject knowledge on the part of students, who may not be able yet to draft legal documents even in their mother tongue as these skills are acquired during legal practice.

Not unlike other countries, in Poland there is also a need for universities to equip law graduates with the knowledge, skills, and competencies regarding legal English. The goal here is to enable them to communicate effectively in an international environment, thereby potentially giving them an edge over their competition in the job market. However, teaching legal English in Polish higher education institutions comes with a set of constraints which are similar to those mentioned in the case of Israel. These include

curriculum time, students' insufficient foreign language skills, and background legal knowledge. Additionally, the lack of a standard curriculum for teaching legal English at tertiary-level institutions might also hinder effective instruction (Sierocka, 2016, p. 225). Moreover, students' lack of familiarity with historical, cultural, and social contexts of common law countries and with the differences in legal traditions may pose additional difficulties. Interestingly, many publications regarding teaching legal English in Polish higher education institutions revolve around analysing law students' or legal professionals' needs (Łuczak 2010; Sierocka 2017a; Sierocka, Chovancová and Kordić, 2018), curriculum design and implementation (Sierocka, 2014b; Sierocka, 2016) or a model of a legal English teacher and a legal English teacher's professional development (Łuczak, 2012; Sierocka, 2017b). As a result, the literature on the subject offers a collection of recommendations and some useful guidance for course designers and teachers rather than reports on methods and strategies applied in university programs.

H. Sierocka (2016) describes her attempt at designing and implementing an effective legal English course aimed at developing the necessary skills for the legal profession. Initially, she conducted a needs analysis before the course, which revealed that speaking was considered the most helpful skill, with writing, listening, and reading coming a close second<sup>11</sup>. She reported facing challenges when trying to incorporate writing practice into the course. Several factors contributed to this difficulty: writing assignments tend to be time-consuming, the course duration is limited due to organizational constraints, and students were initially reluctant to complete writing tasks either in class or as homework. Interestingly, despite this reluctance, students indicated at the end of the course that "more writing would be desirable". The research also revealed that students expressed a desire for more testing as they wanted to have their progress evaluated. Moreover, they also saw testing as an effective motivator, helping them to increase their learning efforts (Sierocka, 2016, p. 132-138). Given that speaking ranked highly in students' needs, a natural consequence is to put emphasis on pair and group

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<sup>11</sup> Sierocka, Chovancová and Kordić (2018) conducted a comparative study of lawyers' needs in relation to legal English. They found that Polish respondents (legal professionals) ranked speaking as the most important skill, followed by writing and listening, while reading was considered the least important. What is more, the results of the study helped identify specific areas which should be given special attention, namely, public speaking, vocabulary acquisition, legal writing and telephone communication (Sierocka, Chovancová and Kordić 2018, p.76, 81). These needs and preferences may not fully align with those of students but they do show significant overlap.

work, thus offering opportunities to practise communication skills. When it comes to the course content, it seems that in the Polish setting branches of law that are central to civil law legal culture should also be included. This would enable aspiring lawyers to effectively explain the concepts of the Polish law or those of EU regulations to their clients or to draft documents based on these concepts. When asked for recommendations, language specialists (i.e. language teachers) suggested including civil law (encompassing family law, intellectual property law, property law and inheritance law), company law, and employment law in the course curriculum, whereas subject specialists (i.e. law instructors) supplemented civil law with European law and contracts (Sierocka, 2017a, p. 17). However, research findings reported by K. Mroczyńska (2023) revealed that the majority of legal English courses offered as part of law programs in Poland rely mainly on publications intended for the international market (Krois-Linder 2008; Krois-Linder, Firth and Trans-legal 2011; Mason 2021), a notable exception being *Legal English: Niezbędnik prawnika* (Sierocka, 2014a), which caters specifically to the needs of Polish students of legal English. Since the core content of publications intended for the international educational market does not align with the suggestions of Polish law specialists in Polish higher education institutions, teachers often have to supplement textbooks with their own materials. The scarcity of published legal English materials aimed at developing the content of Polish law is also mentioned as a drawback by A. Łuczak, who argues that Polish students do need to acquire the ability to discuss Polish legal issues in English. This underscores the need for legal English teachers to supplement their courses with in-house materials dealing with domestic law issues (Łuczak, 2012, p. 123). Another interesting issue is the perception of the importance of teaching specialist vocabulary and grammar among language and subject specialists. While there was consensus as to giving priority to vocabulary expansion, their opinions diverged as to how much grammar content should be provided. Language specialists suggested that only essential structures needed to be taught while subject specialists' opinions varied: some of them viewed grammar aspects as crucial and others as irrelevant (Sierocka, 2017a, p. 29).

The needs reported by ELP course target groups (i.e. law students and legal professionals) (Sierocka 2016, 2017a) are somewhat at odds with the make-up of the majority of textbooks intended for teaching legal English, where priority is given to reading comprehension and vocabulary expansion, followed by drafting documents. This discrepancy, along with the necessity to supplement the course curriculum with aspects of civil law, indicates that either the course should be based on a textbook intended for this region or

it should utilize some in-house material covering the issues absent from textbooks offered by international publishers.

## **Conclusions**

The literature review carried out in the previous section allows for several conclusions. Firstly, it is evident across all surveyed countries that a broad awareness exists regarding the multifaceted challenges associated with learning and teaching legal English. There is also a shared acknowledgment of the diverse group of legal language learners, which includes law students, various legal professionals, legal translators/interpreters, English teachers, and others. These learners, apart from their professional backgrounds, may vary in their general language proficiency, legal knowledge, and legal English skills. Their motivations for enrolling in a legal English course may also vary widely, adding complexity to the learner profile.

The teaching of legal English, given the myriad of factors influencing students' learning needs, is undeniably intricate. Balancing these diverse factors often calls for bespoke approaches, underlining the significance of needs analysis in developing course frameworks and syllabi that cater to students' needs, backgrounds, and motivations. The process of syllabus design is described by Sierocka (2014b, p. 40) as a "dynamic mix of juggling and doing puzzles." In the case of legal English courses, the end product may well reflect Komorowska's (2006, p. 119) concept of a "skewed syllabus"—one that prioritizes usefulness and students' needs over a balanced approach that equally emphasizes all skills. However, it is important to note that, despite careful planning, any developed syllabus might still require further modifications to better align with the teaching context.

The review suggests that the various courses analyzed do largely accommodate the diverse needs of students. Integral to these courses are the resources they incorporate. While legal English teachers have an expanding selection of textbooks to choose from, they may often need to be selective and supplement these resources with custom materials to meet specific student needs and expectations. Given the many contexts a legal English course may be designed for, a one-size-fits-all textbook is not only non-existent but also unrealistic.

Technological advances, particularly in corpus linguistics, have opened new avenues for enhancing legal English teaching and learning. These innovations facilitate the development of a broad spectrum of learning materials, such as worksheets, glossaries, lists of phraseology, and even specialist

dictionaries<sup>12</sup>. These resources offer tangible benefits to both students and teachers of legal English, though their effective use might require additional training.

With the diverse needs of legal English students, a corresponding diversity in legal English teachers is expected. Various factors—general English proficiency, legal English proficiency, legal knowledge, pedagogical skills, and proficiency in the students' native languages—can influence a teacher's suitability for a specific course. Hence, it can be inferred that legal English teachers might also need to specialize in teaching legal English within a particular context. One method to support legal English teachers' professional development is to provide them with insights into various legal English teaching practices. Such insights might come from detailed case studies and comparative studies, which may inspire teachers and course designers. In this way, local solutions to global problems can potentially carry global implications.

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<sup>12</sup> See for example *Towards a dictionary of legal English collocations* (Michta and Mroczyńska, 2022), which offers an overview of noun-centered collocations culled from the judgments handed down by the UK Supreme Court.

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**Mentalising school.  
Could the development of the ability to mentalise  
support the functioning of students, parents,  
and teachers in the school environment?  
An attempt at answering the question, taking into  
account reports from international research**

**Abstract:** Mentalisation is a multifaceted cognitive activity, which enables individuals to interpret the behaviours of others (and their own) in terms of intentional mental states. A person, who engages in mentalisation, is aware that human behaviour stems from one's mental state. The ability to mentalise begins to develop in childhood, primarily through safe relationships with caregivers, but it can be cultivated throughout life thanks to, among others, functioning in a mentalising environment, such as a school. This article aims to address the question of whether developing the ability to mentalise can support the functioning of students, parents, and teachers in the school environment. Findings from previous research and interventions conducted in various parts of the world not only provide an affirmative answer to this question, but also identify the characteristics of a mentalising school which caters to the need for future-oriented education.

**Keywords:** mentalisation, psychological interventions, mental health, school environment.

## **Introduction**

Mentalisation is a term that has recently become increasingly popular in the psychological and psychotherapeutic community. ‘Mentalising refers to the activity of understanding behaviour as being related to states of mind, such as thoughts and feelings’ (Allen et al., 2014, p. 19). The mentalisation theory is an umbrella concept, which encompasses a wide range of intrapsychic processes and integrates theoretical contributions from different disciplines: neuropsychology, psychoanalysis, attachment theory or the theory of mind (Luyten et al., 2020).

Mentalising disorders, which usually entail poor use or integration of information about the mental state – one’s own or others, occur across the spectrum of mental disorders (Luyten et al., 2020). The diminished ability to mentalise is considered a primary neuropsychological deficit in autism spectrum disorders (Castelli et al., 2002; Philip et al., 2012), or borderline personality disorders (Allen and Fonagy, 2006). However, people with other mental disorders (e.g., those suffering from depression, obsessive-compulsive disorders, eating disorders) may also experience difficulties with adequate mentalising (Fonagy and Bateman, 2011; Sharp and Venta, 2012). Similarly to any healthy person, in a highly stressful situation (Bak et al., 2015).

Promising research results on the effectiveness of *Mentalisation Based Treatment* (MBT), encourage the use of this concept not only for the treatment of mental disorders, but also for their prevention. It seems valuable to design mentalising interventions and implement them in non-clinical contexts, i.e. in schools (Fonagy et al., 2009; Valle et al., 2016). It has been shown so far that, for example, the use of a mentalisation approach throughout the school system, can be effective in reducing violence (Fonagy et al., 2009).

In this article, I aim at answering the titular question: Could development of the ability to mentalise support the functioning of students, parents, and teachers in the school environment? Thereby, I introduce the concept of mentalising, present research findings concerning mentalising in schools, describe exemplary interventions from different parts of the world, to conclude with a summary of the most significant features of a mentalising school.

## **Mentalisation and its role in the social world**

We mentalise when we are aware of states of mind – our own and that of others, when we think about feelings, reflect on the causes of misunderstandings, when we ‘look at ourselves from the inside and at others from within’ (Allen et al., 2014, p. 27). Mentalisation is an activity of the imagination – it implies the ability to imagine what another person might

be thinking or feeling, but also to pay attention to what is going on in one's own mind (Cierpiakowska and Górska, 2016, p. 43). The teacher mentalises, when he or she wonders why a student is sad, or when he or she notices one's own fatigue and looks for ways to take care of himself or herself. At the same time, it is worth to emphasise that mentalisation can be both conscious, controlled, systematic (when we think that we are thinking), but can also take place in a preconscious, intuitive, rapid manner (when we think, but are not aware of it) (Allen et al., 2014, p 57).

The ability to mentalise plays an extremely important role in everyday life; it enables us to understand ourselves, other people, predict social events, and allows us to form satisfying interpersonal relationships (Adamczyk, 2013). Given that the essence of mentalising is the ability to notice, predict and react to both one's own mental states and those of others, it seems that building societies would not be possible had we not been endowed with this ability (Twemlow et al., 2005). Perceiving the other as an individual possessing a distinct state of mind is a unique, human characteristic. According to currently available knowledge, no animal can distinguish between accidental actions and those resulting from intentions, wishes, beliefs, or desires (Twemlow et al., 2005).

The human ability to mentalise is partly innate and partly acquired (Fonagy and Target, 1997). The acquisition of this ability depends on the quality of the attachment relationship and, in particular, on the ability of caregivers to adequately reflect the mental states of the child (Adamczyk, 2013). Caregivers notice, understand and 'give back' the child's emotions, while doing so in a slightly exaggerated and emphasised way, so that the little one can notice that the sadness on, for example, mum's face does not belong to her, but is the child's own emotion, reflected as if in a mirror. Through adequate mirroring, empathy and sensitivity of the caregivers, children learn to regulate their own emotions and, as they grow, gradually acquire the ability to define and give meaning to mental states (Adamczyk, 2013). On the one hand, a secure bond with the caregiver allows for the development of the ability to mentalise; on the other hand, mentalising leads to the development of a safe attachment pattern, and this in turn promotes trusting, calm functioning in the social world (Bowlby, 1973).

Importantly, although the development of the ability to mentalise begins to evolve in childhood, the skill can be cultivated throughout one's entire life. Not only through psychotherapeutic programmes such as MBT, whose effectiveness has been confirmed in studies around the world (Bate-man et al., 2022). An individual's ability to mentalise also largely depends

on the extent to which the environment, in which he or she exists, can be defined as a mentalising environment. That is one, in which it is discussed why people behave the way they do, why they do what they do, what their emotions and behaviours stem from. A mentalising environment can be the family, culture in a broad sense, the local community, as well as the school (Twemlow et al., 2005).

### **Mentalisation at school**

Mentalisation plays an important role wherever people build relationships, especially if it is an adult-child relationship (Valle et al., 2022). Up to this point, a substantial amount of research on the environment that is favourable for the development of mentalisation has been focused on the family. Meanwhile teachers, similarly to parents, can be the objects of attachment (Howes and Spieker, 2008; Pianta, 1999). Teachers are adults, whose role is to take care of the needs of the child, to participate in the child's process of discovering the world, to support the child in developing its capacity to understand reality. Research shows that the quality of the student-teacher relationship, carries over into the child's social and emotional development, behaviour, well-being and even school achievement (Pianta, 1999; Pianta et al., 1995; 2003; 2019). There are also studies, which indicate a link between the teacher-student attachment relationship and the ability to mentalise and regulate emotions among school-aged children (Valle et al., 2016). The authors of the study suggest that a trusting relationship between the student and the teacher contributes to a safe classroom atmosphere, which is beneficial for mentalising. There is no doubt that schools with adults able to mentalise create an environment, where students can develop their ability to understand their own and other people's mental states (Bak et al., 2015, Twemlow et al., 2005; Valle et al., 2016). In turn, this leads to a number of other beneficial effects, which apply not only to children, but also to adults. The ability to mentalise has been shown to be positively related to teachers' psychological well-being. Mentalisation counterbalances the negative impact of stress, prevents professional burnout and thus has a protective function in the case of teachers (Safiye et al., 2023; Schwarzer et al., 2021).

People who have a fully developed ability to mentalise are more forgiving of each other, more willing to help each other, they also find it harder to hurt another person. It is therefore no coincidence that one of the earliest and best-known mentalisation-based interventions, which was developed in response to social (not clinical) issues, was designed to reduce violence in schools (Twemlow et al., 2005). The *Peaceful Schools Program*,

was implemented in the USA in 1994 to enable the creation of *mentalising school communities* to counter violence and bullying among students. The intervention contained several elements, such as campaigns to foster a positive school climate; training for teachers on how to respond to crisis situations (non-violent, using mentalisation); a physical education programme during which children trained self-control; and finally, ten-minute mentalisation talks at the end of each day. A detailed description of the programme was included in a manual, made available online by the authors (Twemlow, 1999), in order to increase the accuracy and replicability of the programme in other facilities (Twemlow, 2005).

However, the Peaceful Schools Programme is not the only one that draws on mentalisation theory and successfully addresses the challenges of the modern school. In recent years, various programmes have been described, which were applied to work with students, parents and teachers in schools from different parts of the world (Bak et al, 2015; Gershby et al, 2023; Twemlow et al, 2011; Valle et al, 2016). Importantly, the interventions undertaken responded to different challenges, depending on the socio-cultural context and current needs. Below, I describe three examples of intervention programmes from three different countries: Denmark, Israel and Jamaica. The selected interventions target different groups of subjects constituting the school community: students and teachers or parents. The programmes also address different types of challenges, demonstrating that the mentalisation approach is universal and can support the functioning of the school community in the face of many, difficult situations.

### ***Denmark***

Researchers from Denmark proposed an intervention programme based on the mentalisation theory that aimed to strengthen students' psychological resilience (Bak et al., 2015). Resilience (psychological resistance), is understood as an individual's ability to cope with adversity, including the ability to recover from unfortunate life events and psychological trauma (Zutra et al., 2010). A fully developed ability to mentalise promotes mental resilience, allows one to understand one's own emotions and to connect them to behaviour (Tohme et al., 2022).

The programme to enhance psychological resilience (Resilience Program), was developed between 2005 and 2007. It was a psychological intervention drawing on the knowledge of mentalisation, neuropsychology and social cognition (Bak et al., 2015). The authors of the programme were asked for help by one of the Danish social organisations, because of the numerous

destructive behaviours displayed by young people, largely immigrants from Middle Eastern countries. Three years after the programme was implemented, the majority of the employees in the organisation were still using it, they found the programme to be particularly valuable, and they indicated that the spread of knowledge about mentalisation and neurobiology was extremely helpful in their daily work. They also noticed a reduction in the number of problematic behaviours exhibited by young people (Bak et al., 2015).

Although the programme appears to be discontinued (the intervention websites are not active), it is worth noting some of its features, which favour the possibility of a wide application of this programme category in educational institutions. Firstly, the intervention took the form of a modular, flexible workshop made available online. Secondly, it was designed to be applicable in any organisational context, including in combination with other interventions. Thirdly, wherever it was possible, the authors suggested using a social model, which included the whole organisation and all the people who were a part of the system. Fourthly, according to the assurances by the authors, after a short training, the programme could not only be used by any specialist, but also by non-professionals, including parents and students. Importantly as well, the programme could be used as preventive or as part of a support component for people with mental health problems.

### ***Israel***

In Israel, an intervention based on the mentalisation theory was offered to parents (Gershby et al., 2023). The programme was implemented via the Internet, and aimed to develop the ability of the parent to mentalise the mental and emotional states of the child whilst doing homework together. The intervention, therefore, addressed a challenge faced by many parents, from different parts of the world. Previous research has shown that parental involvement in doing homework can be a source of autonomous learning motivation for the child, a sense of self-efficacy, and an opportunity to learn self-regulation (Cooper et al, 2012; Grolnick et al, 1991; Pomerantz et al, 2005). On the other hand, misunderstood support can have the opposite effect, being a source of stress and frustration for both the student and the parent (Cooper et al., 2012; Katz et al., 2012). Factors which reduce the effectiveness of parental support during homework assignments mainly include parental control and negative emotionality, which can manifest as i.e. taking responsibility for the tasks of the child, putting too much pressure, excessive monitoring and checking, impatience, or hostility and derogatory comments (Grolnick et al., 1997; Pomerantz and Eaton, 2001).

The proposed intervention focused on the parents' ability to reflect, mentalise the needs of their child before offering to help with homework. Thirty-seven Israeli families participated in the study (21 were assigned to the experimental group, 16 to the control group). The main part of the programme was to encourage parents to observe their child for a period of two weeks, prior to doing homework together. During a meeting with the researcher, parents were taught an observation technique, given a specially prepared guide and asked to observe their child for five minutes each day and complete a form about the observation. The results have shown that even such a simple intervention brings positive results, contributes to the development of parental mentality, their curiosity about the mind of the child, and supports the development of learner autonomy. Naturally, the authors of the study indicate some limitations, point out the pilot nature of the intervention, however, they also emphasise its advantages, the fact that it is short, easy to implement and accessible to all parents.

### ***Jamaica***

In Jamaica, in turn, the intervention was based on the aforementioned Peaceful Schools Programme. This intervention has improved academic performance, reduced aggression and increased pro-sociality among students (Twemlow et al., 2011). A remedial programme based on the mentalisation theory (Allen et al., 2014) and the attachment theory (Bowlby, 1973) was implemented in an institution with multiple, diverse problems. It was a school suffering from the atmosphere of fear and suspicion about the motives of others. Adults, whose role was to look after the welfare of pupils, were overwhelmed and hopeless. Any behaviour that deviated from violent norms i.e. helping others was considered a sign of weakness (Twemlow et al., 2011).

It is worth to outline the context, in which the school functioned. According to the authors of the article, which was published in 2011, the educational process was highly valued by the Jamaican society at the time. Parents placed great hope in the educational success of their children, and tied their hopes for a better future to them. However, this was not reflected in the school funding system, which did not provide adequate support for the children, for example, there was no organised transport, school meals, assistance for children with educational or emotional difficulties. There was a high degree of disparity between pupils, with some being well cared for, prepared and fed, while others clearly neglected, left to fend for themselves and sometimes simply hungry. Lessons were conducted in overcrowded,

stuffy classrooms with no space for either the pupils or the teachers. The use of physical punishment was permitted.

The intervention programme was targeted at students in the older classes, who tended to step into the role of bullies towards younger pupils, themselves being not favoured by the teachers, seen as the ones who cause problems, with is no hope of success. In order to develop a mentalising attitude among the pupils, the Peace Centre was set up – a workshop, where students, together with instructors (belonging to the local community), did manual work (i.e. making beads, weaving baskets, embroidering). Learning to mentalise took place in the meantime. The instructors talked to the students, modelled desirable, helpful behaviours, reflected with the students on the causes of different events. They created space for empathising and helping. They responded to conflicts whenever they arose. Just as importantly, the food of the children was also provided. The centre became a meeting place, where pupils were fed, felt safe and could count on each other. As the children began to mentalise, warmer relationships between them emerged. Over time, the programme also gained support among the teachers, who noticed beneficial changes. Importantly, the creators of the programme did not impose new pedagogical methods on them, but encouraged the use of less repressive ways of coping with challenges. The implementation of the intervention allowed for the creation of such a school atmosphere, which fostered understanding and thinking, seeing another human being. This in turn increased the feeling of safety among students and teachers, and also allowed for cooperation.

## **Conclusion**

The modern school should educate for the future. In turn, the prerequisites for a well-functioning person of the future include, among others, mental health and the ability to cooperate with other people (Pyżalski and Plewka, 2022). This is precisely what mentalisation fosters. In the face of a rapidly changing world, numerous civilisation challenges, and with an increasing number of mental health problems, we need simple and effective psychological and pedagogical interventions to support the functioning of students, teachers and parents. Through research conducted in different parts of the world, it can be concluded that the mentalisation based approach makes it possible to build effective intervention programmes, which respond to the various needs and difficulties occurring in the school environment. Then perhaps, the school of the future is a mentalising school, i.e. one, in which:

1. the aim of upbringing is to develop the ability to mentalise;
2. one is encouraged to reflect on the reasons for one's own and other people's behaviour;
3. a safe relationship can be built;
4. there is no violence;
5. there is time to talk.

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## **Socio-economic context of education in the light of selected indicators**

**Abstract:** The text touches upon some socio-economic problems of education, illustrated with selected indicators. Apart from the introduction, which presents components of HDI, the paper is divided into two main parts. The first one discusses expenditure on education in the context of student achievements and social development. The second presents new education contexts such as education in the context of COVID-19, inclusive education and desirable changes in the education structure.

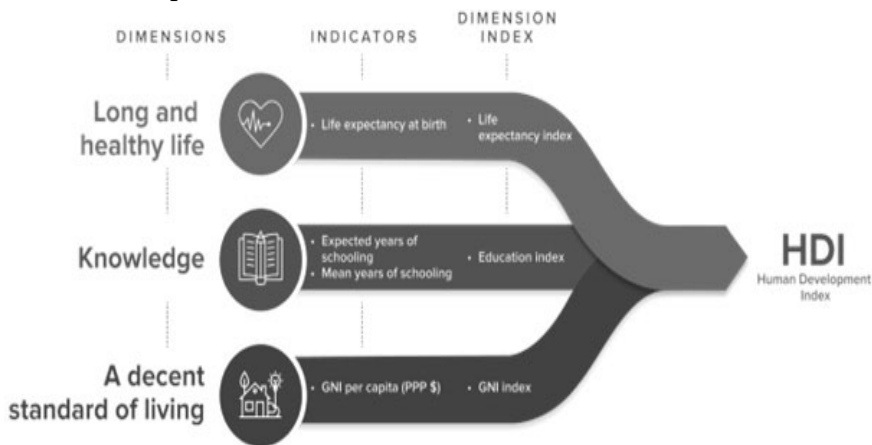
**Keywords:** human development, student achievements, expenditure on education, COVID-19, inclusive education.

### **Introduction**

As late as until a few decades ago, only one indicator was most often used to measure the standards of living, especially in international comparisons, i.e. gross national income (*GNI per capita*). It represented the value of what was produced, sold/purchased in a country (services, foreign trade balance) - per 'statistical' inhabitant - usually in US dollars according to the purchasing power in the country. However, after some time it was rightly recognised that the material standard of living is not enough to assess the overall conditions in which a person lives. The traditional division into wealth and poverty began to be extended to other measures which also determine the quality of human life.

A special place among analytical comparative indicators - due to the scope of information and the number of countries compared - is held by the Human Development Index (HDI). Since 1990, the UNDP (*United*

*Nations Development Programme*) has been preparing and publishing global, regional and national reports. Already at that time, it was emphasised that the ultimate criterion for assessing a country's development should be the people and their capabilities, not solely the economic growth. Among the reports published, the most important are the global ones, which currently take into account the level of human development in more than 190 countries. Poland has been ranked 32-35 in these rankings in recent years and is counted among the 66 countries with a 'very high level of human development'. The main objective of each report is a detailed analysis of the HDI, but dedicated to a given subject which is discussed in more detail. The main narrative in the vast majority of the reports is equality, justice and different contexts of human development.



**Figure 1.** Dimensions and indicators of the HDI. <https://hdr.undp.org/data-center/human-development-index#/indicies/HDI>. Accessed: February 2023.

The three dimensions of the *HDI* are health, knowledge and decent standard of living. The state of health, of the human body, is expressed in terms of life expectancy for a child born in a given year. This indicator can be interpreted as a synthesis of many influencing factors, such as health care, unpolluted environment (water, air, soil, food), but also as a consequence of social awareness of health, which is influenced, among others, by educational factors (education is also often positively correlated with earnings). In terms of life expectancy, the 'record holders' are Hong Kong, Japan and Australia (85.5-84.5 years). The average for Poland is 76.5 years and, although it is known that women generally live longer, the differences in our country are significant (women 80.4 and men 72.6 years) (UNDP, 2022, p. 286). It is also worth mentioning at this point that in the poorest African countries

this projection has recently been as low as 52-58 years (UNDP, 2022, p. 275), which is still an improvement on the situation from a dozen or so years ago, when this indicator did not exceed 30 years. The level of 'wealth' is influenced by a number of factors, with the record holder being Liechtenstein, where the GNI *per capita* was almost \$147 000. Some muslim countries, Singapore and most Western countries score well in this respect (\$60-90 thousand). Poland ranks 44 here with a value of \$33 000. Unfortunately, there are also countries in Africa with less than \$1 000 per capita annually (UNDP, 2022, p. 272, 275).

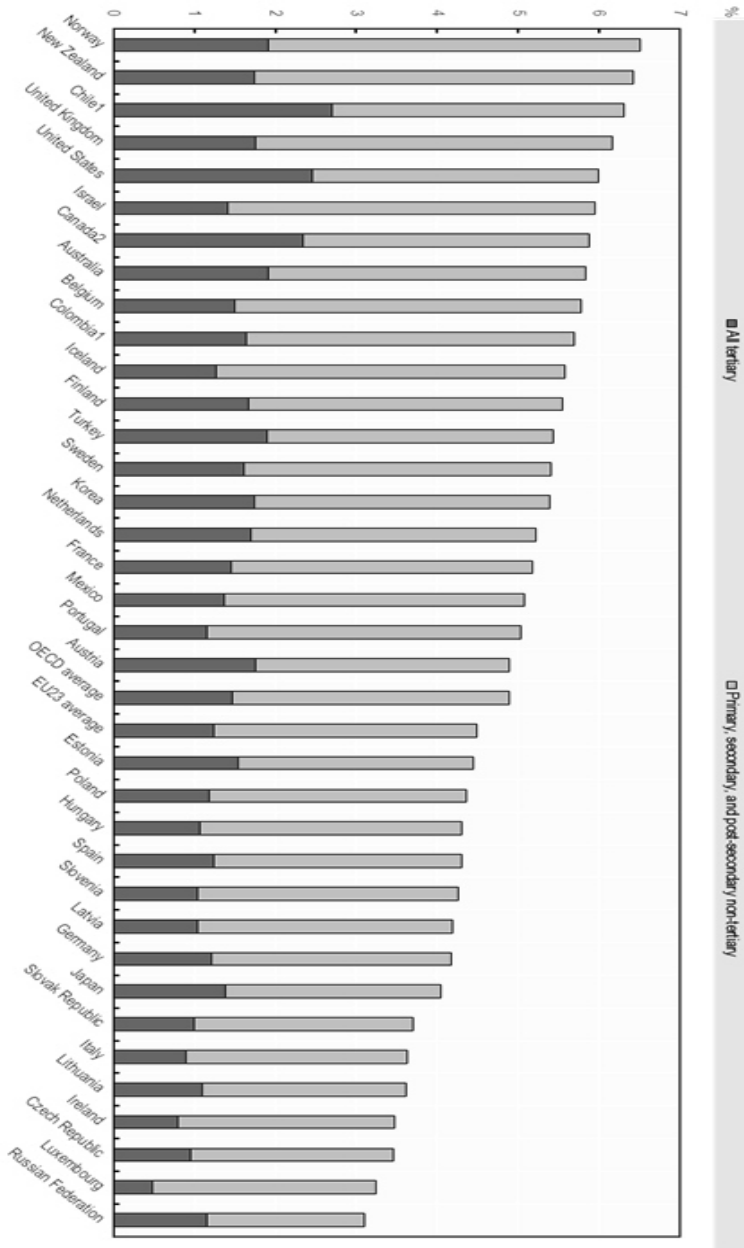
### **Education and social development**

Education plays a significant role in the assessment of the level of human development, since out of four components of the *HDI*, two represent synthetic educational characteristics. Until 2009, these were expressed in terms of literacy rates (the opposite of illiteracy) among those aged 15 and over, and total schooling rates (gross - the number of pupils, students irrespective of age in relation to the population at three levels of education). Both of these indicators were questionable, with missing data in many countries, and for these reasons it was considered that a better characterisation of the educational situation in a given year and country would be provided by the expected number of years of education for a child of school entry age and the average number of years of education received by people being at least 25 years old. In terms of expected years of education, for a long time the leaders have been Australia (21.1 years), New Zealand (20.3), the Scandinavian countries, Belgium, the Netherlands; for Poland this indicator amounts to 16 years (UNDP, 2022, p. 272). In terms of years of received education, Poland (13.2 years) is among 14 countries where that indicator ranges from 13 to 14.1 years (Germany) (UNDP 2022, p. 272). In the poorest countries (Africa), the first education indicator was 5-10 years, while the second, which speaks more about the past and the present of education, was only 2-4 years.

Comparing educational indicators (specified above and those measuring student achievement, educational expenditure) with the overall human development index and other 'non-educational' characteristics, it can be concluded that these indicators, characteristics often coexist. There are also deviations from this general rule (discussed later in the text), determined by yet other factors.

**Expenditure on education** (primary, secondary and post-secondary education) is not merely an effect of the importance attached to education in the broad sense of the term in each country's strategy, but also of their capabilities (due to their level of economic development, wealth). Total expenditure on schooling and tertiary education - as a % of gross domestic product (GDP) estimated by the OECD ranges from slightly over 3% (Russia 3.1%, Luxembourg 3.25%) - to 6-6.5% (Norway 6.5%). In Poland, this indicator has remained at the level of 4-4.5% for many years. Poland belongs to a group of countries with a similar educational 'effort', such as Estonia, Spain, Latvia, Germany and the Czech Republic, where total expenditure on education ranged from slightly over 4 to 4.4% (OECD 2022a, p. 254).

The issues related to the financing of schooling as well as post-secondary and higher education are supplemented by data on expenditure per primary and secondary pupil and per student/course participant, expressed after appropriate conversions to US dollars. Expenditure per student is generally much higher than per pupil. The former generally significantly exceeds \$20,000 in the richest countries (Luxembourg over 52,000, USA \$35,000), while the largest expenditure per pupil does not exceed several thousand US dollars (exception: Luxembourg \$22-25,000). Poland with its expenditure per 1 pupil and 1 student - ranks among the countries with the lowest individual expenditure (among several dozen OECD countries compared, and these are not the poorest countries - quite the opposite). Estimates for our country were as follows: per 1 pupil over \$8 000, per 1 student approximately \$13 000 (OECD, 2022a, p. 238).



**Figure 2.** Expenditure on education and higher education (in % of gross domestic product).

However, there is no simple correlation between expenditures, educational spending and **pupils' educational achievements**. It is not always the case with higher spending/expenditure being correlated with higher student performance (as measured by large international school achievement surveys). For example - until recently, Portugal spent considerably more money on 1 pupil's education than Korea, and in school achievement rankings of pupils it was, and still remains, behind Korea, which for many years has been in the world's top in terms of school achievement of 15-year-olds (PISA). Israel and Norway spend more than 6 % of GDP on education, and their students rank further down the list in PISA 2018. Similarly Luxembourg - its spending per student and pupil is the highest in the world, and its 15-year-olds rank in the fourth ten of PISA 2018 achievements (OECD, 2019 a, p. 17). Poland, in terms of the achievement of 15-year-olds (around 10th place) is much higher in this ranking than in terms of expenditure per pupil, percentage expenditure on education or, finally, in terms of the level of wealth (income *per capita*).

There are at times no clear correlations between pupils' achievements and the level of wealth in some countries - which is also confirmed by the results of SERCE (*Second Regional Comparative and Explanatory Study*) conducted in 2006 (they were not repeated at any later date) in 16 South and Central American countries and one state (Mexico) among more than 196,000 third and fourth grade students. It concerned the assessment of their proficiency in reading, writing, mathematics and scientific knowledge. It turned out that children from Cuba were the best achieving pupils, followed considerably further by pupils from Chile, Argentina, Uruguay, all of which were much richer than Cuba at the time. In Cuba, the favourable accompanying processes were the small variations in results due to gender and place of residence (generally the best results were/are in urban areas). It was emphasised that where there were large social and economic disparities in the other countries studied - there was a positive impact in bridging the inequalities of educational institutions (UNESCO, 2008), which should primarily be understood as the result of great effort made by teachers.

Indicators concerning the standard of pupils' educational conditions are already in line with the division: highly developed/poor countries. For example - the number of pupils per 1 teacher in primary schools in the most developed countries does not exceed a dozen or so; the leaders are Luxembourg, Liechtenstein - 8 pupils/1 teacher. Poland - 11; in the least developed countries - several dozen pupils per 1 teacher (Central African Republic - 83) (UNDP, 2022). In terms of school access to the Internet (primary and

secondary schools), dozens of countries have 100 % access in both types of schools (including Poland). At the bottom of this ranking are countries where only a few percent of schools enjoys this access (or none at all) (UNDP, 2022).

Large-scale, international surveys of pupils' educational achievements are to some extent related with politics and can be used for a variety of purposes. Perhaps their greatest significance is reflected, or should be - in education policy. What are the strengths and weaknesses of a particular education system? How can the results/experiences of other countries be used and how can they be implemented in the education system, teacher education, etc.? The announcement, publication of reports from such studies is always quite an event in the field of education, especially when students perform well in comparison to other countries. These reports also have an important scientific, cognitive significance - on the basis of detailed databases (publicly available) - researchers carry out a much more detailed research, well beyond the results achieved by the pupils. It has also happened, and still does, that politicians use such reports for their ad hoc political purposes - attributing a significant role to themselves if the students' achievements turn out to be a success.

Some projects already involve a large number of countries and the fact that the results of these international studies are reaching an ever wider audience makes them impossible to be ignored. They are not only used for further research by various research institutions and, above all, noticed by politicians (not only those specialised in education) which, of course, still does not always translate into specific action taken by individual countries. However, there have also been situations when, after the results of the PISA 2006 and 2009 surveys showed that Kyrgyzstan's 15-year-olds ranked last in both 'reading' and in mathematics, the priorities of state education policy were re-evaluated, emphasising the importance attached to measurable, practical skills (WCCES, 2010).

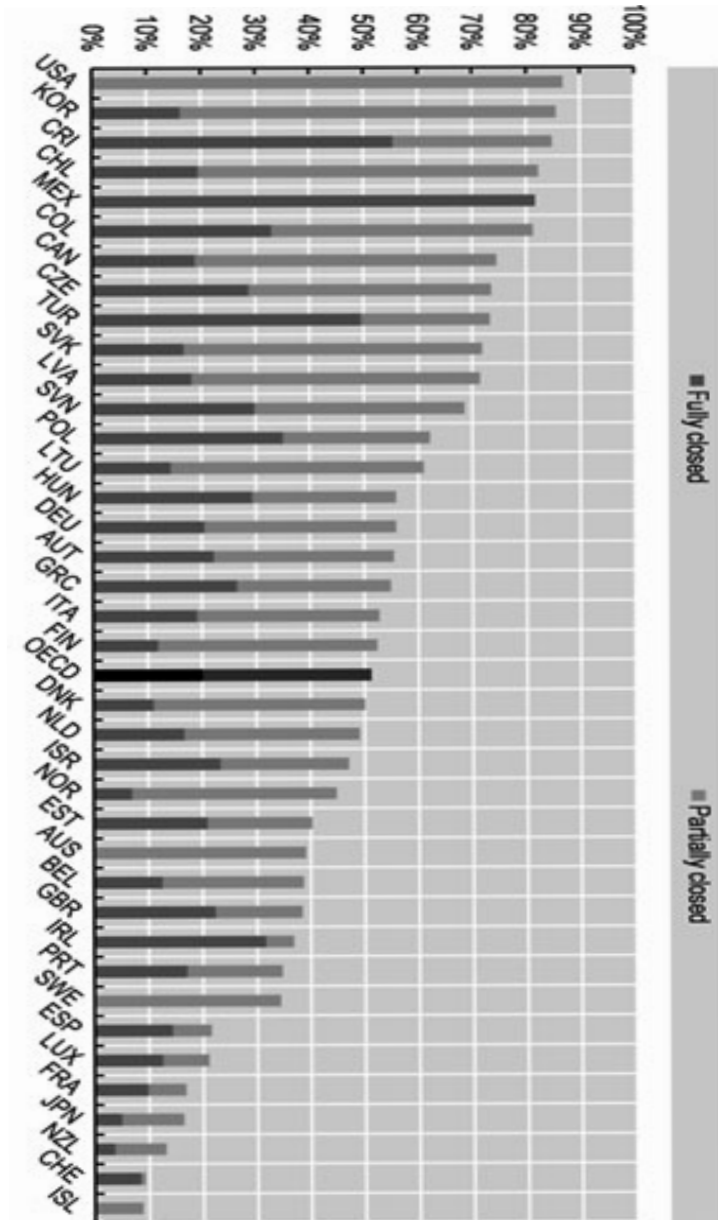
The project of the greatest scale, with more than 660,000 15-year-olds from 79 countries/regions taking part in its 2018 edition - solving tasks and answering questions - is PISA. The standardised tasks are divided into three blocks ('reading', mathematics and science) with at least 500 points representing the highest level in each of them. In 2018, there were six such countries in Europe (Estonia, Finland, Poland, Ireland, the UK and Sweden, respectively). These were Europe's top performers; outside Europe, very good results were also achieved by students from Canada, Korea, Japan, Taiwan, New Zealand, the United States, Australia. However, the world record holders were the 4 provinces of the PRC (maths and science 591 and 590 points), Singapore,

Macao, Hong Kong - so the dominance of China, and perhaps more broadly - of Southeast Asia, is apparent. There are also countries where students scored just over 400 or even below 400 (Philippines, Dominican Republic, Kosovo, Lebanon, Morocco), and it should be noted that the poorest, least developed countries - primarily from Africa - do not even participate in PISA surveys.

In 2021, the PISA survey was postponed due to COVID-19 until 2022 and included pupils from more than 90 countries (OECD, 2022 b), with a total of around 3 million pupils having already participated since the first survey in the year 2000.

### **Education and new contexts**

The world, most probably, has the peak of the **COVID-19 pandemic** behind it and approaches it with greater composure than before, but it is worth recalling some of the data and analyses related to this process - especially in the context of education. Moreover, they tend to be omitted in the pattern of their explanation from the position of economic disparities and pupil achievements. It seems that the pandemic, and the decisions that were not always justified in its aftermath (as we now know), apart from the negative effects in terms of health, economics, mental health, etc., has resulted in a certain increase in public health awareness. From a teaching point of view, it has contributed to an increase in the level of familiarity with the commonly used communication techniques or platforms, as well as with the functionalities of the devices themselves (computers, laptops, smartphones, etc.). This applies to pupils, students, teachers, lecturers and also parents. Due to the pandemic, not only teaching, but also the existing ways of conducting examinations, tests, etc., were disrupted in most countries, which made changes indispensable - first and foremost in terms of the form, but in some cases also in terms of the content, scope of the material, number of questions, etc. This applied, moreover, to the ongoing monitoring of pupils' achievements (Piwowarski, 2022).



**Figure 3.** Percentage of teaching days when educational institutions (kindergartens, primary schools, secondary schools) were fully and partially closed - excluding holiday breaks and summer vacations (March 2020 - June 2021).

According to OECD data, education policies varied widely in the face of the pandemic. On average, in 37 countries between March 2020 and June 2021, 20% of educational institutions were completely closed and 31% partially closed. In Poland during this period, 35% of institutions were completely closed and 27% partially closed. There were also countries where educational institutions were not closed completely (0% - Australia, Sweden, Iceland, USA) and those where the majority were completely closed (Mexico 82%) (OECD, 2021d). The greatest restrictions resulting in school closures occurred at the beginning of the pandemic. Overall, the higher the organisational level of the institution - the longer they were closed. On average, in the period between January 2020 and May 20th, 2021, the following were completely closed: kindergartens 55 days, primary schools 78 days, lower secondary schools 92 days and upper secondary schools 101 days (OECD, 2021d, p. 6). In the case of kindergartens, national governments have generally pursued policies in line with the fact that the preschool age is particularly important for the child's cognitive and emotional development, and for this age group providing effective ways of remote learning, remote play, etc. proves extremely difficult thus requiring the participation of parents/guardians. For these reasons, kindergartens were closed for a shorter period than schools, and 5 countries did not close them at all (January 2020 - 20th May 2021: Austria, Latvia, Estonia, Finland, Sweden). During the same period, Polish kindergartens were closed for 50 days, primary schools for 96 days, and secondary schools for over 190 days (this was one of the highest rates among the 30 countries surveyed - this type of school was closed longer only in Mexico). In most countries, the situation returned to 'normal' in 2022. Only the Netherlands (in all levels of education), Latvia (in secondary education) and Poland (in general secondary education) decided to close their schools completely for at least five days during the 2021/2022 school year (OECD, 2022). The pandemic has particularly negatively affected vocational education, where a significant part of learning consists of practical activities, often difficult or impossible to replace with *online* transmissions (OECD, 2021c).

An analysis of COVID-19 infection rates across countries shows they were not related to the number of days in which schools were completely closed, and that the number of days significantly varied among countries with similar infection rates (however, these differences may also be due to different amounts of tests done). Performance on the PISA 2018 reading and reading comprehension test was also found to explain 61% (R square = 0.6104) of the variation in the number of days on which secondary schools were completely closed in 2020. (OECD, 2021d, p. 21). It is evident that in countries with

the longest school *lockdowns* (approximately 150-180 days - Brazil, Mexico, Colombia, Costa Rica), student achievements were the lowest among the 30 compared countries. In the group of countries whose 15-year-olds scored above 500 in the PISA test (including Estonia, Finland, Ireland, Korea, Poland - approximately 510-520 points), schools were closed for an average of several dozen days. Poland's position is slightly different in this respect: the aforementioned good PISA score is 511-516 points, and secondary schools in 2020 were closed for significantly longer (110 days). Naturally, different circumstances and different policy motivations in each country may have contributed to such a varied situation. However, where worse results were recorded - direct teaching was lost due to *lockdown* to a much greater extent than in countries with better educational results. Presumably also, in the 4 countries of the Americas mentioned previously - the provision of adequate conditions counteracting the effects of COVID-19 was more difficult than in the other countries surveyed and the school infrastructure, teachers were not fully prepared for hybrid teaching. This is partly confirmed by data regarding computer ownership and Internet access in the pupils' homes - in Colombia and Mexico, 50-55% of pupils had access to such amenities (in most countries studied, including Poland, the rate was 90-95%) (OECD, 2021d, p. 144). It is possible that the epidemic not only caused educational inequalities between countries, but also widened these gaps. The World Bank estimates indicate that the disruption in learning caused by the pandemic may have led to a 25% increase in the proportion of pupils scoring below Level 2 on the PISA test (Level 1 and 2 are defined as the worst performance, among 6 levels of achievement) (OECD, 2021b; Piwowarski, 2022).

Also presented are the results of the 2021 study on how respondents felt about loneliness-related several risk factors during the pandemic: financial hardship, unemployment and education level, among others. The data shows that higher education contributes to people feeling less lonely, especially in conditions of at least partial isolation. People with higher education were also significantly less affected by financial hardship and unemployment (OECD, 2021a, b).

**Inclusive education** (*inclusive teaching*) has an important place in pedagogical theory and practice, and its increasing role can be especially seen in recent years, as evidenced by publications, reports, or webinars (e.g.: UNESCO, 2020; UNESCO, 2022). The basis for inclusive education is to ensure that all teachers are prepared to teach all students (UNESCO, 2020, p. 137). This simple but not always easy principle is implemented in various ways - primarily due to the fact that teachers are not equally prepared for

such teaching. Standards, qualifications vary according to the national context, while a common problem in many countries is the gap between school systems and the identification of difficulties faced by learners. This primarily concerns barriers in access to teaching, participation in education and finding solutions to overcome such difficulties (ibid.). The practice of teaching shows that it often deviates from the declared postulates, principles. This is evidenced by the data of the quoted UNESCO report (citing OECD, 2019 sources): among the 43 countries surveyed (excluding Poland), many teachers failed to meet the challenge of diversity. In Norway, Finland, Slovenia, Korea and Japan, less than 50% of teachers indicated that they had adapted their teaching to the cultural diversity of their pupils (in Japan only 20% - perhaps there is no need there), while in Portugal, Colombia and the United Arab Emirates, the rate exceeded 90% of teachers. (UNESCO, 2020, p. 140). It should also be added that very few countries run introductory courses for teachers (before they start work) on inclusive education. In Poland, inclusive education faces far fewer difficulties (still) than in racially, religiously and culturally diverse countries. However, many educational institutions have faced the challenge of the influx of children from Ukraine coming to Poland - generally with positive results.

Finally, the issue of the **structure of education** (especially at tertiary level) is becoming a global one and, similarly to inclusive education, is gaining increasingly more relevance. From the perspective of economic development, in the light of numerous data - the conviction shared by many governments, important organisations, economic associations (often international ones) that too little of young people (above the age of 16) choose studies and professions related to the so-called *STEM* conceptual block (*Science, Technology, Engineering, Mathematics*) is correct (Archer, 2015). Recruitment to certain fields of study in Poland in recent years, as well as expert opinions, show that the issue also concerns Poland. In recent years in Poland, students representing such groups of fields of study (according to ISCED'97 classification) as physical sciences, mathematics and statistics, biology, environmental protection constituted in total less than 6%; those from engineering faculties accounted for 8 - 9% of the total number of students. Students of pedagogical faculties, arts, humanities, social sciences, economics and administration, law and a few others (which cannot be included in STEM) - constituted about 60% of the total number of Polish students; the structure of graduates completing their studies is similar (calculations of the author based on: CSO, 2015, p. 32). However, the situation in Poland in

this respect is gradually improving, although the over-feminisation of some fields of study remains a problem.

Despite the fact that since 1970 congresses on **comparative pedagogy** have been organised by the WCCES (World Council for Comparative Education Societies), which bring together thousands of participants every three years - the results of these meetings have little comparative value and the only similarity with the data constructing, for example, the HDI index are the slogans of the individual congresses, which also refer to problems, educational fashions and oftentimes politics.

## **Conclusion**

Socio-cultural, economic circumstances often explain a country's position as measured by the educational achievements of its pupils, or other educational indicators (such as the duration of received and projected education in the HDI indicator). Less often, the educational situation explains to some extent a country's position in terms of the wealth/poverty of its population, but can positively influence a country's level of human development. This is the case, for example, of Poland - our position is adversely affected by income per capita, but we are 'pulled' upwards by good educational indicators. Poland's position in terms of the described measurement of social development would also be higher if men in our country lived longer.

In terms of pupils' educational achievements, a certain dominance of Southeast Asian countries/metropolises can be observed, which is probably determined not only by the curricula, education and social position of the teachers, but above all by the characteristics of people from the Far East (attitude to work, discipline, cultural tradition and probably other factors). This dominance is clearly visible by comparing the results of educational programmes such as PISA and TIMSS-M. Certainly, there are also countries whose 'educational' and 'material and social' position and their correlation - and especially lack thereof - is difficult to explain, as it is influenced by other, poorly measurable (or unmeasured) indicators.

However, it is undoubtedly noticeable that there exists a civilisational gap, clear differences between the countries of the rich 'North' and the poor 'South', where social development, student achievements are positively correlated. The exception may be some Arab/muslim countries, where material wealth (oil) does not always go hand in hand with the performance and characteristics of students, education systems, which is probably in many cases conditioned by cultural or religious factors.

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## **Monitoring in the development and quality assurance of the education system**

**Abstract:** The aim of the article is to discuss the potential of educational monitoring, which is part of the debate on the quality of education, which has been ongoing since the 1980s. The assumptions of educational monitoring are situated in the theoretical and methodological concept of controlling the output resources of the education system as an opportunity to achieve better results by recognising changes in the framework conditions and process factors. The new approach to education control also fits into the context of an evidence-based policy that, according to the needs and expectations, can shape the development of the education system and set long-, medium- and short-term goals. In the article, it was considered important to first recognise the essence of educational monitoring and the dominant theoretical approaches and selected models, and then to identify and analyse the challenges related to it in the education sector in terms of development and quality assurance.

**Keywords:** educational monitoring, quality of educational system, educational effectiveness.

### **Introduction**

The problems of development and quality assurance are part of the field of educational effectiveness research – a relatively new field of research and analysis which has developed in response to the James S. Coleman *Equality*

of *Educational Opportunity* report (Coleman, 1966). The conclusions from the report came as a surprise. For it showed that there was a slight correlation between the conditions of schools and student achievement. Countering the belief that 'education cannot compensate for society' (Berstein, 1970, p. 344-347), research was initiated, which originally aimed at identifying the determinants of school effectiveness, in order to extend the search over time to the entire education system. This encouraged the researchers to conduct the research internationally and to see whether the developed solutions work similarly in other socio-cultural contexts and may contribute to identification of the processes and determinants for the development of educational effectiveness.

The approach adopted in the new millennium has been strongly reinforced by comparative research, whose relevance has been increasing lately. The status of comparative research has been recognised in the identification of framework conditions, i.e. conditions that are universal enough to provide a basis for the improvement of educational systems by other countries, despite existing political, economic, social, or cultural differences (Nowosad, 2019, p. 6-71).

One can assume that educational institutions have found themselves under pressure related to costs and their legitimacy. This has directed the attention of the international community towards the adequate use of resources and initiation of the effective processes in the various education systems. Consequently, the question of the resources provided to educational institutions and, more precisely, the relationship between their use and results has become increasingly more significant.

Terms such as system monitoring, educational standards or evaluation have gained importance and are present in all educational debates in developed countries. The importance of these terms has been reinforced by international school effectiveness surveys such as TIMSS, IGLU, PIRLS and PISA. These have provided a significant impulse to educational research and also had a substantial impact on school policy and practice. Thus, there has been a growing need for tools to provide reliable information on the quality of education and allow it to be systematically evaluated and guide further improvement. One such tool is systematic, data-driven observation and analysis of the education system in the broad context of its determinants, i.e. educational monitoring.

In most highly developed countries, monitoring is a widespread way of gaining knowledge about the education system. However, this raises questions about its potential and demonstration of which theoretical models have

gained recognition and legitimacy? What real benefits does it bring to the development of the education system? And more specifically, to what degree does it ensure the development of the quality and efficiency of education? And to what extent does it support the formation of educational policies aimed at refining (developing) the education system as a whole and its different levels? Attempts to answer the questions posed in this manner form a part of the current discourse on the development and quality assurance of the education system and set the order of the analyses referred to in the present article, including an effort to present the selected approaches.

### **The meaning, functions and expectations from educational monitoring**

The category of monitoring derives from the Latin *monitor*, in other words ‘alerting’. Its essence comes down to constant observation, control of processes or phenomena, and overseeing something (cf. *Polish Language Dictionary PWN*, 2022). In management theory, the concept was originally associated with the processes and phenomena related to company functioning, as not only ‘screening’ or taking a close look at it, but also signalling the possibility of potential dangers (Bugaj, 2022). Essentially, educational monitoring can align with the levels and responsibilities of educational administration and concern the macro level – the education system, the medium level – the local (municipalities and counties) and the micro level: individual educational institutions. However, it is predominantly implemented at the national level (Döbert, 2009; Döbert, 2013).

Internationally, there is a high level of consensus in understanding and defining educational monitoring as an institutionalised form based on continuous observation and data analysis (Grünkorn, Klieme and Stanat, 2019). An overview of existing approaches allows us to assume that educational monitoring is:

a continuous, data-driven process of observing and analysing the education system as a whole (from nursery to adult education), as well as individual areas or parts of it, in order to inform educational policy and the general public about the framework conditions, course, results and effectiveness of educational processes. Educational monitoring can relate to both the participants and addressees of educational processes as well as the institutions of the educational system (Döbert, 2013, p. 29).

Educational monitoring can also be understood as a strategy of mapping the quality of the education system, which is achieved by continuous data collection on relevant indicators and keeping track of them, so that crisis situations can be spotted at the right time. The results should either directly influence the education system's control processes or form the basis of scientific analyses for the purpose of expanding the knowledge relevant for the control. Its stimulating effect on development stems primarily from comparisons with other countries or other sectors of the education system. What remains largely unresolved is how the results can be made available at different levels of the school system in an efficient and effective manner (Eder, 2011).

Educational monitoring implementation can be understood as the search for an effective link between the diagnosed needs and particular actions at the level at which they can be introduced. In such cases, educational monitoring executed at the municipal level can provide findings which will become an important impulse in shaping local political action. Brock and Mahl believe that this can occur as long as the findings of the monitoring, recorded in reports and documents, reach the relevant bodies, which will make decisions on their basis. As a result, empirical data in the form of quantitative and qualitative data will feed into local political discussions and influence processes of local politics (Brock and Mahl, 2019). Here, however, emerges the structural problem of education management at the local level, which aims to support central educational policy processes in the municipality, i.e. the implementation of central recommendations. In this case, the implementation of the obtained results into local political and administrative processes poses a challenge for many countries. Indeed, there are relatively few arrangements for the use of educational monitoring data within a municipality (cf. Michel, 2018, p. 17).

Nevertheless, educational monitoring is most often referred to as 'system monitoring', in which case it has essentially three functions:

- the function of observing, analysing and presenting relevant aspects of the education system,
- the function of system control, especially with regard to efficiency measurement, as well as
- the function of 'system diagnostics' by identifying changes and problems, as generating and extending knowledge about control (Böttcher, Bos, Döbert and Holtappels, 2008).

This narrow understanding of functions is sometimes expanded depending on the adopted perspective. Rürup, Fuchs and Weishaupt, for

example, take educational reporting as the most comprehensive form of educational monitoring. The researchers specified the expectations set for educational reports and demonstrated eight of their functions.

- providing data on the education system and quality development,
- justifying an addressee-oriented presentation of the education system
- a reference point in the cycle of political planning
- promoting evidence-based policy
- optimising educational leadership and management
- improving quality in the education system (indirectly at least)
- ensuring transparency of the education system for the public
- increasing public satisfaction with education policy (Rürup, Fuchs and Weishaupt, 2010).

In undertaking an analysis of the functions listed above, Eder points out that the first two seem relatively easy to implement, as well as to verify, since they are ultimately a part of the implementation of monitoring and he considers them to be the functional effect. The third to sixth functions are different and can be understood as user-related effects. This occurs when the content of educational reports is actually noticed. The last two functions – transparency and satisfaction – are not directly related to the content of the reports, but coexist with them. Eder refers to them as side-effects of monitoring (Eder, 2011).

As a result of monitoring actions, institutional educational processes become more transparent and can form the basis for public discussions and decisions. Monitoring information, as a product of monitoring, should by definition record a broad spectrum of data from educational requirements, to educational pathways, to educational outcomes. The data collected is usually combined with qualitative characteristics of the institutions. At that point, they open up a field for the ‘interaction’ of the obtained results and the recognised conditions, both organisational and personal ones. Some of the recognised data is ultimately concentrated in indicators, which are located at the level of the education system or individual areas of education or levels within the structure of the system. In this perspective, educational monitoring is systemic (Döbert, 2008) and fundamentally differs from evaluation. However, despite their differences, the categories are strongly linked, as it is difficult to carry out good evaluation or control without monitoring the processes (Hense, Böttcher, Kalmann and Meyer, 2019).

The focus on the development of the system and its individual institutions requires the monitoring and evaluation of education to be combined

into one system in terms of control. Such a comprehensive system, according to Dederling, can be fuelled by four main sources of data:

- data from educational statistics,
- data from international comparative studies
- data from surveys on the achievement of educational standards and other studies which provide additional information on the quality of learning processes in individual schools,
- data from educational reports focused on specific, other data components

(Dederling, 2010).

It is also worth mentioning that educational monitoring is more than just the reports themselves, which constitute its component related to educational standards, comparative research, accreditation and evaluation of educational institutions (Niedlich and Brüsemeister, 2012). Most often developed on behalf of the government, they constitute results of empirical research, published at regular intervals, systematically collected, focused on viewing the different levels of the education system and administrative areas of responsibility, demonstrating the relationship between subsystems, control of the process over specific time segments on the basis of the indicators (Döbert and Klieme, 2009). Thus, the basis for the preparation of the report is a set of indicators which can be updated to obtain a complete description of the processes within the system. As Niedlich and Brüsemeister emphasise, education reports are addressed to a wide audience in order to show all relevant aspects of the education system and the information under its control (Niedlich and Brüsemeister, 2012).

Another important aspect of educational monitoring indicated by Tegge is the fulfilment of the social function of education. The premise of monitoring, then, is to cover the entire education system and ensure the development of its quality. As Tegge notes, in order for educational monitoring to cover the entirety of the processes within educational institutions, it is important to determine the extent to which:

- individuals are able to self-manage their own biography, the I-environment relationship, as an individual regulatory capacity,
- provision of skills required on the job market and thus the quantitative and qualitative workload for the assumed level of welfare and social development is achieved,
- what is the level of social participation, also from the point of view of social cohesion, and prevention of discrimination based

on gender, region, social background, national or ethnic origin (Tegge, 2015).

Educational monitoring is intended to support policy and society regarding possible interventions to optimise the system in accordance with the guiding principle of lifecycle education (Döbert and Klieme, 2009). The essence of educational monitoring is to promote accountability and facilitate action, primarily on the basis of quantitative results. The information obtained to improve and ensure quality is identified and the relationships that occur are demonstrated (Fickermann and Weishaupt, 2019). For this reason, in addition to the monitoring itself, it is important that its results are not only well justified, but also clearly presented. Another significant aspect is to present topics central to long-term policy, which are developed in a continuous manner, as well as topics that are significant for ad hoc policy. Only such an approach creates the basis for developing the necessary recommendations and their implementation. The guiding principle then is to involve all those responsible for education in the efforts towards improvement.

### **Evidence-based education policy**

In the new management model for the education system, the control over the process was related with the monitoring of educational processes, and education policy was based on evidence. It was assumed that educational policy makers will act more effectively when they have a broader and structured control knowledge of how the system works. The relevant database is provided by evidence-based educational research (Altrichter and Heinrich, 2006). Usually, evidence is associated with scientific knowledge showing empirical facts from an external perspective. Bellmann and Müller describe this perspective as a hypertechnocratic model of control which attempts to show empirical facts from an external perspective (Bellmann and Müller, 2011). However, just as important as providing crucial control knowledge for the system of educational processes is the improvement of transfer of scientific knowledge to educational policy and practice (Tippelt and Reich-Claasen, 2010). Such an approach, however, raises some questions, e.g. demonstrating what knowledge should form the basis of such control (Dziemianowicz-Bąk, 2011).

The new guidelines for the management of education system have changed the approach to education policy and became part of the context of evidence-based policy, which advocates relating decisions and practices to the analysis of available facts.

In education policy, Dederling reduces the basic principles of such an approach to four broad stages:

- subjects in the education system are provided with reliable knowledge,
- acquired data is received professionally, appropriately processed and interpreted by those making decisions,
- the process of data acquisition and processing results in decisions relevant to the existing problems,
- based on the decisions made, measures are developed and implemented which should lead to improvement of quality (Dederling, 2010).

The variation of this framework approach can be reconstructed in at least three models: the rational policy-making model and the development and quality assurance model i.e. development of school and teaching quality supported by feedback and the model of data transfer in development and quality assurance in accordance with the concept of a multi-level system.

The rational model for policy making was formulated by the Swiss Coordination Centre for Research in Education (*Schweizerischen Koordinationsstelle für Bildungsforschung, SKBF*) with the aim of using educational reports in the collaboration between politics and science (Eder, Posch, Schratz, Specht and Thonhauser, 2002). The model assumes that key questions are formulated by politicians in the period leading up to the preparation of the report. Thus, a special feature is the provision of information and a database which meets the requirements of politicians and addresses already known challenges. For example, where there are already symptoms of crisis or where there is an accentuated problem. The educational report as a product of this cyclical process acquires a dynamic component in this case. Although the model highlights the process of transformation from well-established knowledge to the stage of relevant planning decisions initiated by policymakers through evaluation and discussion, it does not explain the circumstances under which knowledge can be transformed into deliberate administrative action by political actors and thus encounters the limitations of the influence of intention and control activities described by Altrichter and Heinrich (Altrichter and Heinrich, 2006). Another weakness highlighted by Eder is the narrowing down of collaboration to the community of politicians and researchers without representation of all key actors in the education system.

Data acquisition and its implementation potential presents itself differently in the model of development and quality assurance. It fits into the framework of the so-called multi-level models, in which Jaap Scheerens

emphasises the importance of designing and implementing specific control and evaluation procedures from a systemic perspective:

- procedures are not applied selectively, i.e. to evaluate specific activities and programmes, but are institutionally introduced as part of the control system and continuously applied,
- evaluation initiates and sustains development and learning processes in accordance with the principle of feedback-driven learning,
- different types of empirical research, each of which serves a specific purpose, are examined together and used synergistically,
- and the last condition: to organise and interpret the results, a theoretical framework model is used, which combines the analysis of context, entry resources (input), process and exit resources (Scheerens, Glas and Thomas, 2003).

Then, the fulfilment of the framework conditions indicated by Scheerens ensures the broadening of the acquired data through its transfer into the educational system – this occurs when comparative data from schools is processed or when contextual data is included. Schools then receive feedback which forms the foundation for its development and enhances the effectiveness of educational processes.

The model refers to quality development instruments of the education system developed for Austria. It draws attention to two key issues: (1) quality assurance at different levels of the school system and (2) it stipulates data collection not only at the national level, but also at the ‘lower’ levels: local, school and classroom. It also shows the relationship of data circulation between the levels and situates the significance of the collected knowledge in educational reports which returns to the lower levels in an enriched form as reference data, norms, etc. There they can act as specifications, comparative data and generate development processes. A weakness of the model, however, is the failure to demonstrate the course of setting and commissioning a school on a path of development. Again, Eder notes that one can only rely on the abstract, unsupported assumption that the acquired data will prove to be helpful and will be used in management.

Looking at these two different models prompts several important reflections. Their greatest weakness seems to be the lack of a description of how the data will be used and the course of information transfer, which is very vague and makes no direct reference to the manner in which decisions are implemented. As Eder points out – it is based on the assumption of a kind of inductionism that ‘good knowledge’ will translate into ‘good action’ and that

the perceived discrepancies of the rational process existing between accepted expectations and actual circumstances will motivate change on their own. Another abstract approach is to assume that the well developed knowledge will be applied as a starting point for development and indicate where the process will begin. Unfortunately, the process of transforming knowledge into action, as Eder further notes, is much more strongly conditioned by the overall conditions (pressure for change, orientation towards accepted goals, availability of resources in the implementation of change) than by the quality of the collected data. Thus, educational monitoring emerges as a reliable process, yet one that is still theoretically poorly justified in its approach to school quality development.

A different approach is presented by the model of 'educational monitoring as a communication process'. The basis of the model is founded on the assumptions of social communication processes, which should be understood in terms of theory of systems. It has been built into a nuanced description of the environment, where one can identify subsystems between which communication processes occur. Regardless of the relationship which interlinks the subsystems into a network, some communication areas can be defined more clearly because of stronger correlations existing within them. It is worth noting that for more process-oriented approaches which are related to the analysis of communication between subsystems, other methodological approaches will be needed to address the reconstruction of communication processes.

In the assumed monitoring structure of the system, Döbert, Eder and Seeber distinguish three subsystems (Döbert, Eder and Seeber, 2014).

- the evidence system (*das Evidenzsystem*),
- the legitimacy system (*das Legitimierungssystem*) and
- the development system (*das Entwicklungssystem*).

In their description, Eder highlights that an evidence system is essentially created through the interaction of three parties: educational policy, education administration and science. It is oriented towards the formulation and use of the monitoring system. The operational foundation here is the rational policy model, while the main task is to make decisions. The legitimacy system is created by combining the evidence system with the media and public opinion. It represents the symbolic client whom the evidence system is designed to serve. This is due to its orientation towards the improvement of life opportunities of children and youth. An essential function of this system is to mobilise and clarify the necessary actions. The development system, conversely, involves the connection between the evidence system

and the entities involved. It emerges from the execution of expectations – the transformation of control impulses into action.

The model identifies the three main subsystems as illustrative ones and their further development can thus be assumed. However, regardless of the structure, development and changes which actually take place, the results of the interaction between the subsystems are crucial. Then the assumed analysis of the effectiveness of educational processes implies, already at the stage of the construction of instruments, to use the effect of this interaction in the formulation of not only the research questions, but also the use of the obtained results for the planning of interventions. In this case, the design of the research project will have to begin by adopting the assumptions of system theory in the circulation of information and taking into account the different framework conditions of the three areas: the evidence system, the legitimacy system and the development system (Döbert, Eder and Seeber, 2014).

In transforming information into action-oriented knowledge, two key issues seem to be of significance: relevance (need) and application value (power to influence/induce changes). Knowledge is intended to establish actions and decisions which will influence and direct the work of the relevant actors in the education sector and lead the system towards change (Döbert, 2010). However, certain conditions have to be met. As Altrichter and Heinrich emphasise – not all data and information made available to actors in the field of education turns out to be relevant for development planning. It is also difficult to expect that all of the planned interventions were fully implemented and proceeded without any side-effects (Altrichter and Heinrich, 2005). In this case, it is only possible to reduce contingency or arbitrariness in the planning of interventions. An attempt to do so is presented by North in the ‘staircase of knowledge’ model, in which he distinguishes between data, information, knowledge and action (North and Kumta, 2018). In this instance, simply collecting and combining the information is not a sufficient condition for acquiring knowledge. Rather, various pieces of information must be gathered together, processed and organised in an increasing hierarchy of steps leading to a desired result.

The obtained database forms the grounds for initiating interventions. The knowledge is most often contained in an educational report, which is the product of the data collection process. If we assume that this process is conducted periodically, it takes on a dynamic dimension (Tegge, 2015). However, despite the developed ‘steps’ to strengthen the process of reducing contingency, it seems that this model also leaves still open possibilities of transforming the knowledge into specific actions. As a result, the process

does not seem so straightforward, as there are no clear answers on how to deal with the identified challenges. One can assume that this line of enquiry is still ahead of us.

### **Conclusion. Challenges and open matters**

The relevance of educational monitoring appears to be particularly important in our current reality, which is described as changeable, uncertain, complex and ambiguous. It highlights a greater need for a vision grounded in evidence which reduces uncertainty and, on the basis of the results of research, makes it possible to foresee and modify the process of improving the education system in its various areas and at different levels of management.

Educational monitoring primarily provides descriptive knowledge, which can be used to identify the strong points in the work of schools and to determine the achievement of set goals. The extent to which education policy utilises such knowledge is a new field explored in many countries, hence the lack of systematically conducted analyses and numerous issues yet to be validated. Considerably better examined is the problem of the extent to which knowledge from comparative research on school and classroom development is used by teaching professionals. However, even these findings are not entirely consistent. International research findings have shown that the use of evidence is often less 'linear' and 'instrumental' than assumed. Rather, it presents a gradual, long-term process of influence and change of assumptions on the grounds of which decision-making can take place (Dederling, 2010).

Among the main challenges there are still the implementation of knowledge from educational monitoring to educational policy and pedagogical practice as well as the optimisation of the use of data-based feedback at school level and embedding the feedback processing system in a coherent system of quality development in the education system.

To ensure utilisation of the potential of educational monitoring, a number of areas needs to be strengthened, such as support from educational research, including research on the education of children and youth, the labour market and the inclusion of other disciplines or research as supportive ones. In this field, the concept of indicator-based educational reporting unfortunately fulfils this task to a very limited extent. As a result, educational reporting based on indicators can never present the whole spectrum of processes: activities, changes, problems (especially recently emerged ones) in the education system. Educational monitoring in order to assist the quality

assurance processes of the education system and school development must also be open to emerging challenges as well as take them into account.

A consequence of the consideration of educational challenges and other still under-recognised but important fields is the inclusion of qualitative findings which analyse problem areas considered particularly relevant for educational policy. These can constitute a complement for quantitative data which register the dynamics of change. These new areas of monitoring can be oriented towards the problem and analytical depth, which will take into account aspects of development of the education system in the short and long term. It is also an area in which the diversity of processes of individual educational institutions can be presented and properly appreciated. Such complementation seems relevant in the case of orientation towards improving the quality of educational processes, the development of schools or the school system – fields which are also of public interest.

Researchers agree that there is a need to consider more than one condition in the development of a coherent educational monitoring system to ensure the development and protection of the quality of education:

1. Monitoring of the system takes place in a diverse network of subsystems. The primary objective must be to analyse and reconstruct the communication in/and between these subsystems.
2. Despite the general agreement on the tools needed for monitoring, the main question remains as to the significance of the chosen indicators or characteristics for the development of students' learning processes.
3. Findings from educational monitoring must directly correlate with the improvement of educational processes (concept and programme). Therefore, there is a need to develop research capable of demonstrating that information from system monitoring can contribute to the development of pupils' learning processes beyond indirect means, for instance through the mobilisation of key actors which, although desirable at a certain stage, cannot be an end in itself, especially at the lower levels of the education system.
4. At the system level, it is difficult to expect a direct impact of monitoring on the quality of learning and student performance. Therefore, indirect effects can and should be taken into account in this case. It is only important to demonstrate that information derived from monitoring is used to improve the lessons (Eder, 2022).

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## **Everything flows... On the role of knowledge sources and the significance of comparative research in the modern world**

**Abstract:** Contemporary changes in the socio-cultural reality, associated with the revolution in the field of information and the development of new technologies, provide a context for reflection on the problem of the sources of knowledge. The wide access to resources of various data, information and knowledge, related nowadays, in particular, to questions about the manners and limits of using artificial intelligence (AI) at the borderlines of science and education, provokes reflection on the role of contemporary science and its representatives. The reflections are undertaken from the perspective of comparative education, which is treated as a scientific discipline that studies different materials (sources) and constitutes also a field (source) of knowledge. The text presents three aspects of reflection: the origins and development of pedagogical comparativism; its contemporary opportunities and challenges; and the role of the researcher embedded in a vision of the future. Comparative education is presented as the discipline which, through actions and works of comparativists, establishes the value of progress and continuity as inherent developmental forces in culture.

**Keywords:** comparative education, pedagogical comparativism, role of the researcher, knowledge, revolution in information technology, artificial intelligence, liquid modernity

The future cannot be separated from the past. History is, after all, a continuous process. Whoever fails to see the sources and initial impulses of various transformations will not be able to understand the trends, traditions as well as the written and unwritten rules, which guide the development of societies in the present day (Nowakowska-Siuta, 2019, p. 15).

### **The beginning**

Already at the turn of the sixth and fifth centuries BC, a Greek philosopher Heraclitus of Ephesus proclaimed: *panta rhei!* – thus expressing variability, fluidity as an immanent feature of the world. As Zygmunt Bauman (2000, p. 2) argues, there are reasons to consider ‘fluidity’ as an accurate metaphor for grasping the present phase in modern history, which is new in many respects. ‘Liquid modernity’ is a term which defines a group of social phenomena characteristic of civilisation at the turn of the 20th and 21st century, the core of which is constituted by variability, relativity, pluralism, and the absence of borders (Urbaniak, 2014). A fundamental factor of change is the revolution in information technology. Due to the development of information technologies, as a civilisation we are now faced with a situation of an excess of data, information and knowledge (Hejnicka-Bezwińska, 2008, p. 29). Furthermore, computer networks are changing the nature of knowledge, which is shifting from static to dynamic. ‘In the age of the information explosion, the knowledge encapsulated in print slowly begins to disappear, dissolve’ (Pachociński, 2000, p. 387). This situation, associated with a lack of reference points resulting in cognitive and axiological confusion, provoked the need to build a society based on knowledge (Drucker, 1993).

It seems that contemporary comparative education might be reflected in the characteristics of liquid modernity, while at the same time being a response to the needs generated by the current reality. This relatively young scientific discipline is still in a state of flux, making it impossible to define its precise, universally recognised boundaries (Váňová, 2006, p. 50). Besides, as noted by Renata Nowakowska-Siuta (2019, p. 2): ‘(...) in pedagogical comparativism, as probably in no other subdiscipline of educational sciences, the constant variability of facts and their interpretation constitutes its immanent feature’, and research conducted in this area is marked by great diversity (Barczyk, 2001, p. 13). One of its main objectives is to ‘collect, organise and analyse data on the functioning of education systems in different countries around the world’ (Nowakowska-Siuta, 2019, p. 3). Ryszard Pęcherski (2000) emphasises that only comparative studies provide

sufficiently extensive empirical material to answer the questions about the level of universal education, as well as determinants of educational development in individual countries. Piotr Barczyk (2001b) expresses his belief that comparative education can be a source of fundamental pedagogical knowledge and, as Bogdan Nawroczyński metaphorically argues, it is somewhat of a 'window opened to the world.'

Bauman (2000, p. 133) draws attention to the distinct lack of a specific agenda capable of 'pushing the world forward' today and states: 'The most poignant yet the least answerable question of our times of liquid modernity is not 'What is to be done?' (in order to make the world better or happier), but 'Who is going to do it?'. This raises the question of the role of contemporary researcher. The development of information technology, especially artificial intelligence (AI), has caused the ways in which researchers and scientists work today, as well as their roles, to change fundamentally and they may continue to do so in the future. After all, information resources have never been so widely available (Pachociński, 2000, p. 388). However, when it comes to the content necessary for comparative analyses, the researchers still face the unavailability or lack of information and the difficulty of accessing complete and up-to-date information (Nowakowska-Siuta, 2005, p. 13; Nowakowska-Siuta, 2019, p. 1). These and other difficulties, such as those related to comparability and translation issues (Nowakowska-Siuta, 2019, p. 8-10), while limiting both the conduct of research and the development of comparative education – reveal a number of principles standing in the way of production of reliable knowledge, at the same time justifying and reinforcing the need for comparativism in the age of knowledge which is eclectic and difficult to verify. And since, as Nowakowska-Siuta (2019, p. 8) highlights, understanding information is a much more significant intellectual endeavour in this field than simply collecting it, in times of fluid modernity and postmodernity, it is also in this scope that the role of the researcher-comparativist appears essential. If we look at the history, it becomes clear that 'fluidity', typical of the essence of the modern world, could have been used to describe the reality for centuries. Therefore, when reflecting on the future in a comparative spirit, it is necessary to return to the sources and the knowledge contained therein.

### **Sources and development of pedagogical comparativism**

The roots of comparative education, according to the division popular in Anglo-Saxon countries, can be traced back to antiquity, including the works of Xenophon, Cicero and Tacitus, who approached the topic of upbringing in their works. Ryszard Pachociński (1991, p. 11), looking for the

origins of pedagogical comparativism, goes back to Plato, who described the ideal city-state by sharing his knowledge of upbringing in Sparta. Similarly, medieval merchants, missionaries and diplomats travelling to foreign countries included verses on matters related with child rearing in their reports (Váňová, 2006, p. 53).

Although the era of 'pedagogical travellers' provides the present generation with many valuable details of education and upbringing in the ancient times, the beginning of the constitutive period for pedagogical comparativism is most often dated to 1817 (Váňová, 2006, p. 54). Indeed, most historians consider Marc-Antoine Jullien de Paris to be the founder of comparative education, and his work – *Esquisse et Vues préliminaires d'un Ouvrage sur l'Éducation comparée* (1817) – as 'the first ever concise plan for the comparative study of educational systems' (Pachociński, 1991, p. 12-13), as well as the work that 'laid the methodological foundations of comparative education' (Váňová, 2006, p. 54).

Jullien de Paris laid the foundation for the first phase in the development of comparative education at the turn of the 20th century, characterised by the collection of quantitative data. This period is constituted by the extensive efforts to collect documents in the field of education led by Pedro Rosselló, considered the 'father' of comparative education, the director of the *International Bureau of Education*, founded in Geneva in 1925. Since the 1920s, as the second phase of the development of comparative education began, the research interests of comparativists have gradually shifted from describing systems of schooling and higher education to explaining educational phenomena (Nowakowska-Siuta, 2019, p. 4).

The classical period in the development of comparative education – widely recognised as the time when the discipline reached its maturity – dates from the late 19th century to the early 1950s (or 1960s) of the 20th century. This stage begins with a conference held in 1900 in Guilford and chaired by Michael E. Sadler – referred to as the 'second spiritual father of comparative education', because in his paper *How far can we learn anything of practical value from the study of foreign systems of education?* (1964) he presented its first major concept (Vanova, 2006, p. 57).

The classical period is a time of historical analysis. It is characterised by the search for 'determining forces' (M. Sadler), 'hidden principles or factors' (N. Hans), 'driving forces' (F. Schneider) of national education systems. The historical method is the oldest one used to compare pedagogical phenomena. One of the leading representatives of this method was Isaac Kandel. His classic work *Comparative education* (1933) contains a series of monographs

in the form of juxtaposition (a preliminary confrontation of data from equal countries in order to establish criteria for comparison). The contribution of Kandel to the development of comparativism is described by Pachociński (1991, p. 19) primarily as an expansion of knowledge in understanding the way in which the educational systems function. Renata Nowakowska-Siuta (2019, p. 5) emphasises the conviction, stemming from Kandel's concept, that the useful application of the results of comparative research in other countries should be accompanied by a move beyond an information-based description towards an analytical, explanatory and interpretative direction, with an awareness of the context of the educational systems under study.

Nicholas Hans also relied on historical analysis. According to him, comparative education consists of describing and comparing the educational reality of selected countries, analysis of similarities and differences, and an attempt to create general principles. Before making comparisons, the comparativist should study each national system in depth in its specific circumstances and then collect quantitative data on the educational systems concerned (Nowakowska-Siuta, 2019, p. 5).

Prominent representatives of the German comparative education tradition – Friedrich Schneider and Franz Hilker – promoted a qualitative approach to the analysis of data on educational phenomena, seeing more value in it rather than in the systematic collection of data, which does not mean that they belittled the collection of a broad empirical base (Pachociński, 1991, p. 27). The distinguishing feature of pedagogical comparativism is its knowledge-generating nature, and the acquisition of new knowledge occurs at the final stage of comparativist's work, as a result of making an evaluating comparison. The meaning of pedagogical phenomena can only be apprehended in relation to their contexts (Nowakowska-Siuta, 2019, p. 5-6)

Interdisciplinary research in the field of pedagogical comparativism was initiated by George Bereday (Zygmunt Fijałkowski). The methodology he proposed for comparative research comes down to monographic studies of a single country or comparative studies of many countries, conducted at the same time. Research of the first type is distinguished by its descriptive phase, i.e. the collection of purely pedagogical data, and a phase related to the interpretation of the data with the use of methods from other social sciences. Studies of the second type include: a description of the data and selected phenomena; an attempt to evaluate the data; juxtaposition; generalisation (Gmerek, 2016, p. 18). This propagator of an interdisciplinary orientation in comparative research – somewhat paradoxically – reinforced

the independence of pedagogical comparativism from other sciences (Nowakowska-Siuta, 2019, p. 14).

Another advocate of an interdisciplinary approach in comparative education was Brian Holmes, who, in his work *Problems in Education: A Comparative Approach* (1965), wrote that the future of the discipline depends precisely on drawing from knowledge derived from other disciplines. It was intended to assist in educational policy planning. Holmes popularised the problem-based method, consisting of several clearly defined stages. Detailed reflection on the problem and analysis of the context presupposes attention to all the data that are related to it. The contribution that Holmes made to the development of comparativism relates to the solution of practical problems as well as the expansion of knowledge in the field of educational theory.

A particular approach to comparative research was represented by Edmund King. According to him, the rejection of the 'nonsense' boundaries of a scientific discipline is supposed to demonstrate scientific strength and confidence (King, 1973). The comparativist should freely use the methods appropriate to the research goals and problems. He did not create any method himself, but his approach is referred to as the contextual method, due to the study of schooling taking into account a distinctive cultural environment of a particular country (Nowakowska-Siuta, 2019, p. 18). Being enthusiastic about the monograph and its educational significance, he used information from sources such as films and novels to convey the atmosphere of the place and facilitate an understanding of the culture as a whole. The knowledge produced in this way was regarded as close to essayism and other similar forms (Pachociński, 1991, p. 44).

Harold J. Noah and Max A. Eckstein in *Toward a Science of Comparative Education* (1969) direct attention to the study of the relationship between education and society and the verification of hypotheses based on international comparative data (Nowakowska-Siuta, 2019, p. 18). The methodology of comparative research in this approach can be defined in consecutive stages, i.e.: establishment, by means of a comparative study, of the problem to be solved; formulation of hypotheses; definition of concepts and indicators; selection of cases; data collection; data manipulation; interpretation of results (Pachociński, 1991, p. 52-54). At the data collection stage, the authors address the problem of data availability, yet this does not relieve the researcher of his own responsibility. The legacy of the authors still reminds us: 'It is (...) of no small importance to know what materials are available, what sources exist and how to obtain information' (Pachociński, 1991, p. 53).

Looking at the development of comparative education after 1950, Ronald G. Paulston (1993) distinguishes its three phases and their characteristic representations of knowledge within the field. The first one falls on the years 1950s-60s and the dominance of the functional paradigm. Knowledge was 'orthodox and centralised'. The 1970s-80s marked the phase of heterodox struggles between positivism and anti-positivism. The late 1980s marks the twilight of heterodoxy and the time of emerging heterogeneity. In the 1990s, there was a complementarity between different kinds of knowledge associated with the shift 'From Paradigm Wars to Disputatious Community' (Paulston, 1990). Knowledge is becoming increasingly eclectic and textual (Paulston, 1993, p. 35).

### **Comparative education today – contemporary opportunities and challenges**

Reflecting on the place occupied by comparative education in the system of contemporary scientific knowledge, Bocharova (2021) draws attention to the need to provide comparative educational information in order to support individual national systems in finding their way in a rapidly changing world. She observes the educational reality of today through the lens of globalisation while emphasising the role played by communication in this context. This, in turn, cannot be considered today in isolation from digital technologies and online interaction (Bocharova, 2021, p. 205-206). In such terms, comparativism is defined as considering mass media, the internet and other digital technologies as a fundamental social institution, which transforms the world of education, translating into specific ways of analysing local and global educational systems in a context of the network (Bocharova, 2021, p. 205). The network method is a qualitative research method, which involves the unrestricted collection of a large amount of information from a variety of sources, while focusing on understanding, explaining and interpreting the described or presented data. Analytical interest can concern both: the results of observations and expert assessments, as well as the monographs, articles and various documents or information from websites (Bocharova, 2021, p. 205-206). While using this method, the researcher defines the conditions for the emergence and development of the phenomenon under study, defines the context of its occurrence, the interactions through which the phenomenon manifests itself, and its transformations (Bocharova, 2021, p. 206).

Referring to the contemporary phenomenon of globalisation, Renata Nowakowska-Siuta (2021, p. 297) points to one of the 'most significant challenges of comparative education in the 21st century', which is that related to

intercultural dialogue, verification of perceptions and overcoming the stereotypes of other cultures, as cultural diversity lies 'at the core of the civilisational wealth of humanity, especially in the era of globalisation' (Nowakowska-Siuta, 2021, p. 297). The national stereotypes created and reproduced today are burdened with the 'error of ahistorical thinking' (Nowakowska-Siuta, 2019, p. 15), resulting from ignorance of the tradition and history of other nations, and knowledge of these – as Bogdan Nawroczyński (1961) already argued – is necessary to have 'a wide breath'. Thus, in order to understand the contemporary conditions and the transformation of reality, one must know what is happening in the world today and what was happening the day before. From this perspective, it is essential to provide a reliable comparative knowledge – one that grows out of the past and is constantly updated – which, by transcending the boundaries of colloquialism in one's thinking, will serve to demystify false preconceptions concerning other nations.

It is worth adding that in the face of the implosion of media into culture there are new problems as well, such as those related to the reception of media content, in which a negative image of a given nation, including one's own, is conveyed (Kochan, 2017). Judging others as a comparison of oneself to others (Bocharova, 2021, p. 203) in the world of human experience can prove to be at one's own disadvantage. Such a perspective can lead to seeing oneself and one's own nation as different, inferior. Then emerges a need for a kind of internal dialogue with an inclusive attitude, for the sake of secondary integrity. The idea of such inclusion is all the more welcome in the light of recent – though not entirely novel to human history – global problems such as conflicts and wars, in the face of which individual nations, societies of individual countries, appear to be more strongly united on the one hand, and increasingly divided internally on the other.

Adam Regiewicz (2014), while writing about comparativism as a way of studying new media, embeds it, following Edward Kasperski, in the tradition of literary studies, understood '(...) not only as the comparison of knowledge about more than one language or national literature, but above all as the inclusion of the 'Other' – in the form of discourse, genre, text, voice, language – in the field of comparison', with the aim of capturing 'deeper – essential similarities' (Regiewicz, 2014, p. 59-60).

Comparativism, in this view, goes beyond the field of literary studies as a specific discursive practice and a meta-discipline, benefiting from the knowledge and methods developed in other areas (Regiewicz, 2014, p. 60-61). In fact, what is being discussed here refers to a currently emerging comparativist paradigm, in which a specific approach to the sources is revealed as

well. In this approach, the comparatist, who is oriented towards the study of specific aspects of reality and the world of human experience, is supposed to 'go beyond objects' (Regiewicz, 2014, 60), specific creations (e.g. media texts), and include in his study the heterogeneous and heteronomous phenomena that, although having their own distinctiveness, are also characterised by the capacity to integrate with other cultural phenomena, through the search for common places in the reality.

Current trends related to the transformations of the modern world and the need for knowledge to improve this world seem to confirm the possibilities and validity of adopting the above way of thinking about comparativism – including the pedagogical one.

### **Future Perfect? Not so simple. The case of an intelligent machine and the role of the researcher**

Comparative education, while appreciating the role of history, is eager to face the future. The general orientation in comparative studies concerning the future (Pachociński, 1991, p. 23) conditions the orientation towards usefulness. Reflection on the future is included by Maksymilian Chutorański (2021) in his text *Pedagogika 2050* [en. Pedagogy 2050], where he creates a 'story of tomorrow', the aim of which, however, is 'not so much to forecast the future as (...) to activate layers of imagination concerning the present and the sensitivity to other (new) fields of research, (new) educational on-to-methodologies and forms of criticality' (Chutorański, 2021, p. 190). And although the reflection he develops is conducted in the form of pedagogical fantasy, it is certainly worth taking a serious look at. One aspect of this futuristic imaginative creation concerns the use of artificial intelligence in the critical study of education. In the author's imaginary vision, this use has evolved considerably:

AI systems are developed to perform real-time Critical Discourse Analysis in different variants much faster, more accurate and using more data than humans were capable of. On an ongoing basis, performing a meta-analysis of the results obtained from multiple sources, they prepare recommendations for possible changes in the law, forms and methods of organising education. (Chutorański, 2021, p. 196)

In this present tense narrative depicting a vision of the future, attention is drawn to the past form applied to human activity: AI systems doing something better 'than humans were capable of' – as if the latter had become excluded by the development of technology beyond the scope of reality,

outside the system, pushed into the wasteland of history. This is probably not what Noah (1985) was seeking to do when, a few decades ago, he mentioned, among the difficulties faced by the researcher in comparative education, the ethnocentric attitude towards the sources and the resulting problem of formulating conclusions from a particular perspective.

Chutorański (2021, p. 190) makes a claim that ‘(...) the changes we are currently experiencing are forcing researchers to make increasingly bold attempts to go beyond traditional humanistic categories and ways of thinking about the human which place him in the centre of theory, history and the world (...)’. This act, however, inevitably requires a return to the realm of humanistic reflection, as it reveals challenges of an ethical nature, insists on sensitivity towards contemporary pedagogical problems – deeply humanistic challenges. The reason for this is also because it is precisely a human – researcher, who is characterised by certain agency and responsibility for the shape of the future.

Nowadays there are guides, guidelines and recommendations related to the use of AI tools in education. The most popular one at the moment being Chat GPT (Generative Pre-trained Transformer), whose definition of sorts, published on the website of the Ministry of Education and Science, goes as follows: ‘Chat GPT is a tool that uses artificial intelligence to receive answers to questions asked in natural language in a dialogue-like formula. Chat GPT has the potential to significantly change the face of Polish education with its ability to deliver very precisely personalised knowledge’<sup>1</sup>.

Following Ryszard Pachociński (2000, p. 383), it should be noted that ‘intelligent application of knowledge’ presupposes the need to know the context of the production of a particular material ‘(...) in which the data would cease to be symbols and become information that can be used’, for it is only after the data has been embedded in a particular structure that it acquires its proper, source meaning. What kind of context is this in the case of AI?

Exploring the issue of AI in pedagogical research, Grzegorz Stunża formulated, through Chat GPT-4, the question on which foundation AI builds the translation of the world. The following answer to this question was generated: the resources it uses include a powerful corpus of texts from a variety of knowledge sources (books, scholarly articles, websites, news and others) and that, despite the diversity of topics and perspectives, it is likely that the dominant cultural perspective is one related to English-speaking

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<sup>1</sup> <https://www.gov.pl/web/edukacja-i-nauka/chat-gpt--material-dla-nauczycieli> (accessed: 24.04.2023)

countries (United States, United Kingdom, Canada, Australia). Among the factors contributing to the dominance of this perspective is the availability of online data, which facilitates the acquisition of material.

Therefore, in this specific aspect of human-machine contact, a comparative perspective is necessary, with its focus on the context knowledge generation and responsible (co-)operation. Intelligent application of knowledge, as Pachociński (2000, p. 383) writes, implies taking into account ethical and moral codes, as well as principles of good conduct. These aspects are not foreign to the researchers approaching the topic of AI and the use of Chat GPT from the perspective of academic ethics, expressed in the title: 'Chatting and Cheating' (Cotton, Cotton and Shipway, 2023), although, in the considerations carried out in this context, thinking in terms of the alternative: 'Cheating or Opportunity' (Nalaskowski, 2023) is also present. Given the frequent errors in the information provided by the Chat – commonly referred to in responses as 'lies' – GPT responds not infrequently by using the word 'sorry'. However, it has – of course – nothing to do with feeling emotions or good manners; it is merely a programmed function of imitating communicative conventions. From this perspective, it is difficult to think of fulfilling the principles of dialogue or, in the meantime, even the precision in personalising knowledge, let alone its intelligent application.

The differences between a human and a machine from a knowledge-creating perspective are well conveyed by a reference to the pyramid of cognitive concepts, by Pachociński (2000, p. 383) seen on a continuum: *data – information – knowledge – wisdom*. As he writes: data, or rather their repeated structures, create information. It is only when interpreted by people that data takes on value, and for that wisdom is needed:

Information is a collection of facts, which are stored and retrieved from human or computer memory. Information can be understood, analysed and, above all, applied to solve various problems. Knowledge is information processed through the intelligence of a human or a machine. Wisdom is knowledge, the use of which depends on values, ethical principles and good upbringing. (Pachociński, 2000, p. 385)

In this way, the role of the human-researcher in the production of knowledge about education is clearly visible, and this knowledge demands to be enriched with the value of wisdom, as a value irreducible to knowledge (Bezwińska, 2008, p. 29).

### **No end in sight**

Nearly half a century ago, Ryszard Pachociński (1991, p. 56) stated that there is not, and probably cannot be, a general methodology for comparative research. While looking at the various attempts to grasp pedagogical comparativism, one can repeat after Bogusław Śliwerski (2012, p. 323) the statement formulated in relation to pedagogy itself, that in this case as well ‘(...) none of the existing classifications is either final or exhaustive’. Nowadays, the discipline remains ‘diverse and complex’, and it seems that today it is all the more admonished to have an attitude towards sources in which, ‘beyond methods’, researchers will be able to use ‘intuition, reflection, personal judgement in the search for knowledge, in the understanding of cultures and educational systems in other countries’ (Pachociński, 1991, p. 56). Thus emerges the ‘comparatist’s case’, which is not only taken up by, but perhaps above all – whose value is increased through the example of their own work by scholars who make up the history of the discipline. The work of comparativists provides an understanding of how progress and continuity co-exist in human history as indispensable and constantly present forces.

‘The unmoved mover of comparative education’ is how Michał Głazewski (2015, p. 10) writes about the father of comparative education – because, he argues, no one reads his works anymore, nowadays. And yet, the name of Jullien de Paris appears in practically all works in the field of comparative education, for it was with him that an important stage in the development of this discipline began. Returning to its sources of life, one can recall the question posed over two decades ago by Roman Leppert (2000), later recalled by Andrzej Gałkowski (2009, p. 12): ‘How complex of a resume does the founder of comparative education have and how many issues, including of a moral nature, did he have to solve?’ This question – referring to the human biography and the experiences it involved – highlighted today, in an era of the expansion of new technologies and questions about the replacement of humans with machines, takes on particular significance. Comparative reflection with its sensitivity to the idea of comparison of the comparable, among other things, suggests an important lesson for the modern age and implies that there is not, and cannot be, a simple equivalence here. Such attempts in all areas – even more so at the intersection of science and education – are neither possible, nor right: ‘We do not believe that technology will automatically solve our problems and meet our real needs. People will have to make an effort to make technology serve humanity in both the short, and the long term.’ (Pachociński, 2000, p. 391)

Referring to the deliberations of Śliwerski (2012) with the titular reflection: *Cóż po pedagogice w ponowoczesności* [en. What is the Point of Pedagogy in Postmodernity], one might ask: what kind of comparativism is needed in postmodern times? It seems a receptive and generative, inclusive one, open to inter- and transdisciplinary dialogue, open to building communities across all barriers, completing the image of pedagogy as an integral, though not necessarily an infallible, discipline. The comparative knowledge produced nowadays, which is 'branching', heterogeneous (Paulston, 1993), constitutes the image of comparative education being 'in a state of permanent exploration' (Barczyk, 2001a, p. 11). It is no coincidence that in the chapter of the publication edited by Leppert (2000, p. 57) on Comparative Education as a Discipline Describing and Explaining Education in the Contemporary World: between Orthodoxy and Heterogeneity, the following words of Ryszard Kapuściński appear as a motto, which are to be taken here as a symbolic conclusion:

Heterogeneity in writing (...) can also mean uncertainty. Suddenly, a river encounters obstacles, its steady, strong, dynamic current, unable to continue along its bed, starts to branch off, seek new ways out, split, create branches, channels, meanders, curves, labyrinths, streams, bays. This applies to writing as well. Heterogeneity in this case will be a hesitation, turmoil and – a continuing search.

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