

## 2022 Winter Issue

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# CURRENT ISSUES IN COMPARATIVE EDUCATION

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# **Re/dis/assembling “Educational Imaginaries” through Regionalism – The Construction of the Caribbean Education Policy Space**

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*This paper uses a Cultural Political Economy (CPE) framework to apply CPE’s concept of the “economic imaginary” to the educational policy landscape. We consider the Caribbean Community’s (CARICOM) regional education policy space and the focus on Human Resource Development to examine how what we call “educational imaginaries” develop and evolve as a product of intersecting interests, power hierarchies, discourses, and material realities. This paper draws from education policy documents developed by formal regional governance bodies within CARICOM between 1993 and 2021. Using CPE’s four selectivities (discursive, structural, agential, and technological) to examine the construction of the CARICOM educational imaginary, this paper ultimately demonstrates how CARICOM responds to global hierarchies as a regional entity.*

## **Introduction**

Cultural Political Economy (CPE) has emerged in the last decade as a means of pinpointing the economic systems and factors that are a result of specific interactions of what Jessop and Sum (2013) refer to as the “cultural turn”<sup>1</sup> to traditional political economy. CPE combines semiosis (sense- and meaning-making), which involves “the social production of inter-subjective meaning” with political economy, and it does not view “culture (i.e., semiosis) as a distinct sphere of society separate from economics and politics” (Jessop & Sum, 2010, p. 445). As such, CPE engages with the “cultural turn” in

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<sup>1</sup> The cultural turn is less about adding culture to rationalist political economy – which holds modernists believe in singular and universal ‘truths’ – and more about challenging positivist epistemologies of social science research. Thus, the cultural turn “disrupted entrenched ways of thinking about familiar objects of social research by emphasizing the causal and socially constitutive role of cultural process and system of signification” (Steinmetz, 1999, p. 2). In this way, it is a movement away from the materiality of political economy and about an orientation towards cultural variables such as gender, identity, and discourse.

its critique of dominant cultural and social institutions by looking to cultural space's historical, economic, and societal developments to identify how social systems are created at the intersection of these strands. In other words, in a “new period of certain economic (re)organization,” it aims to “decipher the workings of specific economic configurations” (Biebueck & Meltzer, 2010, p. 1), which are a set of multiplicities or a “series of relations of relation instituted over time through different organizations of time – space” (Thrift, 2005, p. 1). These developments aim to capture discursive and material practices as they are interpreted through the construction of meaning by looking at the cultural practices that intersect with economic factors to create a unique temporal space. This space is termed an “economic imaginary” by Jessop (2004), who states that “an imaginary<sup>2</sup> is a semiotic<sup>3</sup> ensemble (without tightly defined boundaries) that frames individual subjects’ lived experience of an inordinately complex world and/or guides collective calculation about that world” (p. 163). Imaginaries are constructed socially and can thus also exist as social imaginaries that have material impacts. As Jessop and Sum (2010) reminds us, economic imaginaries “exist at many sites and scales, can be articulated in many different social fields, and can be linked to many other types of imaginary and social practice” (p. 449). This paper seeks to move beyond the economic imaginaries proposed by Jessop (2004) and consider what we term ‘educational imaginaries,’ created from the material and discursive ensembles that construct ‘educational policy spaces,’ such as funding and placement initiatives.

Using the evolution of the Caribbean Community's (CARICOM)<sup>4</sup> educational policy space as an example, this paper outlines our conception of an ‘educational imaginary’ as a complex ensemble of historical developments, global and regional economic factors, and targeted initiatives that construct a definitive educational space. In this conception, we argue that educational imaginaries are discursively constituted by a set of educational elements and practices that define and delineate a stable educational space, give it structure, and shape the educational experiences and social relations within that space. We suggest that educational imaginaries emerge as economic, political, and cultural forces seek to (re)define specific subsets of educational activities as themes, sites, and governance stakes. We also consider how educational imaginaries may be used as tools of regionalization (an economic process) through the approaches, schemes, and visions that are oriented to these imagined educational systems. The main forces involved with such efforts are trans-regional regimes, such as CARICOM, who seek to establish new instrumentalities of structural and organizational forms by manipulating the boundaries, geometries, and temporalities of the nation state transforming them into objects of observation, calculation, and governance.

This paper uses Jessop and Sum's (2013) conceptions of the four selectivities – structural selectivity, agential selectivity, discursive selectivity, and technological selectivity – of social relations, which create and constitute educational imaginaries as a scaffolding to examine the political project of regionalism and the ensuing economic process of regionalization in the Caribbean and their impact upon education. It will then delve into the historical developments of the Caribbean institutions that led to its creation and the current educational apparatuses supporting and extending it. In what follows, it discusses

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<sup>2</sup> For Jessop (2004) an imaginary is represented by its ability to constitute and reproduce discursive and material practices.

<sup>3</sup> Yet Jessop (2004) always distinguishes the semiotic from the structural and their relationship is always dialectical.

<sup>4</sup> CARICOM's current members are Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

CPE as an approach to studying regionalization. Next, it examines educational imaginaries and their ascension in the Caribbean. Methodologically we use summative content analysis to demonstrate how the four modes of selectivity create and perpetuate the “Caribbean Educational Policy Space (CEPS)” (Jules, 2015a). The paper concludes by examining how these modes of selectivity may effect changes to that space in the future.

### **CPE as an Approach to the study of Regionalization**

First and foremost, CARICOM is grounded upon advancing economic integration amongst its members. Education is central to the Caribbean Single Market and Economy (CSME)<sup>5</sup> – of which the Caribbean Single Market (CSM) came into force in 2006 – and it is premised upon the movement of goods, labor, capital, services, and the right to establishment.<sup>6</sup> CARICOM’s Human Resource Development (HRD) 2030 Strategy (CARICOM, 2017) promotes mobility among CARICOM member states. Therefore, exploring how CARICOM selects and promotes particular discourses is essential to understanding how education strategies manifest in regional economic projects. By examining the Caribbean educational imaginary using a CPE approach to domination and hegemony, this paper grapples with large-scale regional projects such as the CSME and considers how those projects embrace, resist, and indigenize neoliberal forces. The four selectivity mechanisms (discussed below) also allow us to situate CARICOM and the Caribbean educational imaginary in its regional *and* global context. This contextualization facilitates a reading of how neoliberal forces impact regional education imaginaries.

CPE draws upon the works of Karl Marx, Antonio Gramsci, and Michel Foucault to consider why and how particular social solutions are selected to maintain the dominance of a hegemonic order. A CPE approach, which combines structural and discursive analysis, begins with the argument that social actors cannot grasp the world fully; only some of many possible ensembles of discourses and practices can be interpreted. To make sense of and function in the world, actors engage in the process of “complexity reduction” and “sense- and meaning-making” that shape and are shaped by existing and emerging material and discursive circumstances (Jessop & Sum, 2013). These ensembles, networks, or semiotic orders are composed of “genres,<sup>7</sup> discourses,<sup>8</sup> and styles<sup>9</sup> and as such, constitutes the semiotic movement of a network of social practices in a given social field, institutional order, or wider social formation” (Jessop, 2004, p. 166) and are referred to in CPE as ‘imaginaries.’ Imaginaries are “discursively constituted and materially reproduced on many sites and scales” (Jessop & Sum, 2013, p. 174). In a CPE approach, the material (sometimes referred to in CPE as “extra-semiotic”) can be understood as the structural aspects such as funding, resources, and organizational practices. In contrast, the discursive (or “semiotic”) refers to cultural elements such as language, text, and even visual imagery. In the context of this paper, we discuss CARICOM in terms of its function as an educational imaginary with particular practices, orders, and institutions. Examining the CARICOM educational imaginary in the context of the CSM allows us to consider how social, political, and economic circumstances shape education.

To understand CARICOM as an educational imaginary, a CPE approach explores how particular ensembles of practices, institutions, and meanings evolve and their response to crisis. As Sum (2013) notes, “discursive-material interactions become more visible during

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<sup>5</sup> However, the Bahamas and Haiti are not members of the Caribbean Single Market and Economy.

<sup>6</sup> The ability of any Caribbean national to set up a business in any Caribbean Single Market country.

<sup>7</sup> Ways of acting and interacting.

<sup>8</sup> Social practices from the material work from particular positions.

<sup>9</sup> Ways of being and semiotic identities.

crisis conjunctures when sedimented social relations are re-politicized” (pp. 545-546). Within a CPE framework, complexity reduction and meaning-making shape and are shaped by material and discursive features understood through three evolutionary imaginary mechanisms – variation, selection, and retention – and/or institutional and spatio-temporal fixes (Jessop, 2009; Jessop & Sum, 2013). Variation refers to the idea that actors can understand and interpret realities differently in an “inordinately complex world” (Jessop & Sum, 2013). Variation ensures that orders, ensembles, or imaginaries are incompletely realized, meaning that they are never able to correspond directly to external or inevitable reality. Because imaginaries are incompletely realized, they include contradictions and opportunities for crisis that leave them vulnerable to resistance (Jessop, 2009; Jessop & Sum, 2013). Variation among discourse and practice emerges as actors respond to challenges and paradoxes (Jessop, 2009; Jessop & Sum, 2013). Selection occurs as particular narratives or discourses are privileged above others (Jessop, 2009; Jessop & Sum, 2013). This evolutionary mechanism explores how discursive and material forces inform the varied discourses and practices that shape imaginaries and sense-making processes. Notably, selection in CPE is not a natural process; instead, it is the result of dominant cultural and structural mechanisms. Retention describes the process by which certain selected discourses or practices become embedded, habitualized, or routinized (Jessop, 2009; Jessop & Sum, 2013). Orders retained across a wide range of sites increase the likelihood of “effective institutionalization and integration into patterns of structured coherence” (Jessop, 2009, p. 9). In focusing on these three evolutionary mechanisms, our multidimensional analysis of the case below relies on “documentary analysis of changing imaginaries, governmental technologies, and the difference that specific agents can make” (Jessop & Sum, 2017, p. 9).

This paper focuses on selection to understand how the CEPS functions to privilege specific narratives that promote a neoliberal conception of citizenship; in this example, CARICOM’s HRD 2030 Strategy (CARICOM, 2017) calls for the development of ideal Caribbean citizens (CARICOM, 1997). The vision of the Ideal Caribbean Citizen aims for a citizenry that: is regionally-minded who respects human life as the foundation on which all of the other desired values must rest; is psychologically secure; values differences based on gender, ethnicity, religion and other forms of diversity as sources of strength and richness; is environmentally astute; is responsible and accountable to family and community; has a strong work ethic; is ingenious and entrepreneurial; has a conversant respect for cultural heritage; exhibits multiple literacies by displaying independent and critical thinking to the application of science and technology; and embraces differences and similarities between females and males. Based on this, we use the four types of selection found in CPE, corresponding to the cultural and structural mechanisms by which certain discourses are privileged: discursive, structural, agential, and technological (Jessop & Sum, 2013). First, discursive selectivity explores the narratives and language that inform imaginaries’ construction, rules, and actors (Jessop & Sum, 2013). In other words, discursive selectivity explores “what can be enunciated, who is authorized to enunciate, and how enunciations enter intertextual, interdiscursive, and contextual fields” (Jessop & Sum, 2013, p. 215). That is, in the face of complexity, discourse becomes rooted in sense- and meaning-making. As such, the focus is on how actors frame imaginaries (with the aid of genres, styles, and discourses), and in the case of CARICOM, this is done through its HRD 2030 Strategy.

Important to consider alongside discursive selectivity is structural selectivity that centers around the “structurally inscribed” materiality of meaning-making processes (Jessop & Sum, 2013, 204). Jessop and Sum (2013) describe structural selectivity as “the asymmetrical configuration of constraints and opportunities on social forces as they pursue particular

projects” (p. 214). In other words, structural selectivity is engaged with the ways that existing material systems, institutions, orders, and organizations have mechanisms that both limit or enable certain discourses or practices. Therefore, this is grounded in social forms and favors specific agents, interests, identities, temporal-spatial horizons, approaches, and strategies.

Agential selectivity (where agency can be collective or individual) grapples with the ability of social actors to observe structural forces strategically, develop identities, and act (or not act) accordingly, “ultimately, agential selectivity depends on the difference that specific actors (or social forces) make in particular conjunctures and/or in transforming conjunctures” (Jessop & Sum, 2013, p. 204). An analysis engaged with agential selectivity considers how identity, material interests, and capacity for action intersect for different social actors. This selectivity also considers agents’ abilities in exploiting discursive, structural, and technological selectivities.

Technological selectivity is rooted in Foucault’s analysis (focused on power relations in society) of disciplinary mechanisms and governance, whereby power dynamics and social relations are organized in an effort to maintain and reproduce the existing social order (Jessop & Sum, 2013). “Technologies” in CPE can include governance mechanisms such as rules, oversight, regulation, and standards that seek to align the actions and understandings of social agents and bodies. Analyzing technological selectivity is crucial because differences in who can use technologies such as rules and standards, and the material impacts of these technologies play a role in constructing dominant social orders. In other words, technologies deployed by dominant social orders limit opportunities for choice, alternatives, and the possibility for different formations, resulting in the tendency to reform existing orders rather than transforming them (Jessop & Sum, 2013).

Together, these four selectivities of social relations are necessary to understand how CPE engages with ideas of domination and hegemonic orders in that “these modes of selectivity condense particular dispositives and strategic logics that help to secure hegemonies and dominations” (Jessop & Sum, 2013, p. 230). In other words, understanding how certain discourses or practices are privileged by selection mechanisms offers insights into how educational imaginaries, which are multi-spatial and multi-temporal, function. Within this framework, hegemonic systems are shaped by actors engaging with discourse and material structures that shape social orders. Importantly, these selectivities serve to privilege incompletely realized narratives, leaving them open to critique and resistance. Examining how these four selectivities inform imaginaries reveals how resistance, struggle, and domination play out in existing social orders.

### **Historical development of educational imaginaries within the Caribbean**

CPE engages with the institutional turn to observe how a hegemonic order within the CEPS emerges. Institutionalism is central to the application of CPE as

institutions involve complexes of social practices that are: (1) regularly repeated; (2) linked to defined roles and social relations; (3) associated with particular forms of discourse, symbolic media or modes of communication; (4) sanctioned and maintained by social norms; and (5) have major significance for social order. (Jessop & Sum, 2013, p. 34)



To look at the process of retention, selection, and variation is to look at the institutions that facilitate these processes, including their historical development. The approach taken here is a thematic one, which Jessop and Sum (2013) argue “takes institutions seriously by problematizing their existence – but then argues that they can be fully explained within the neoclassical paradigm. This is the strategy of endogenization” (p. 40). The Ideal Caribbean Citizen initiative that has emerged within CARICOM’s educational space is the product of the sedimentation of discourse within CARICOM, beginning with the normalization of ideological pluralism. Ideological pluralism occurred in the 1980s when Jamaica, Guyana, and Grenada undertook various forms of socialism in contradiction to the rest of the region that had capitalist economies.

Educational imaginaries arise when otherwise disparate entities find a nexus event; when other states create economic or military alliances, that can be referred to as ideological pluralism. Ideological pluralism refers to fragmented states with differing economies that are held together by a uniting ideology. Essentially, ideologies that would otherwise be incongruent and incompatible find a sort of ‘middle ground,’ or what can be referred to as loose coupling, in one particular area that can unite them. This need not be a formal alliance, such as the Union of Soviet Socialist Republics (USSR), but refers instead to “the sharing of ideas between contemporaneous ideologies” such as how “there are no great differences in ideologies of the Right, Centre and Left, for instance, in respect of the emergence of industrial society, the ways in which it operates and its structural characteristics” (Seliger, 1977, p. 167).

In the Caribbean, many of the otherwise incompatible states found a uniting force in socialism during the 1970s due to decolonization (Jules, 2013). The Organization of American States (OAS) recognized, in 1979, the Caribbean as a “Zone of Peace” in order to support the “principles of ideological pluralism and peaceful coexistence, which are essential to the peace, stability, and development of that region” (Grant, 1984, p. 174). With much of the infrastructure and education services at a subpar level, a move towards socialism provided common ground to the member states of CARICOM; while socialism itself did not stay, the stage was set for a unified regional approach to education. The Ideal Caribbean Citizen initiative is a conflagration of multiple state interests, at the nexus point of wanting to enter the global economy as a regional force, despite cultural differences within the states of CARICOM themselves. Using this lens as an entry point to observing the Ideal Caribbean Citizen allows us to avoid broad assumptions, as “pluralism can be justified deontically [sic] and/or pragmatically in many ways, but it is grounded ontologically in the complexity of the world, which entails that it cannot be fully understood and explained from any one entry- point” (Jessop & Sum, 2013, p. 7). Seeing initiatives in a region such as this should be viewed as one factor within a region and not a defining factor of the educational space itself, as “ideological pluralism signif[ies] the varying developmental ideologies of member states” (Jules, 2013, p. 258).

Another idea integral to an educational imaginary is the emergence of metagovernance. Jessop (1997) describes governance as “the complex art of steering multiple agencies, institutions and systems that are both operationally autonomous from one another and structurally coupled through various forms of reciprocal interdependence” (p.111). Essentially, while we refer to systems of direct control as governance, a system that functions to direct these other systems without being in control is ‘metagovernance.’ An example of metagovernance would be the UN’s 17 Sustainable Development Goals (SDGs), which provide benchmarks for countries to reach without directly dictating *how* those goals are met. The UN cannot compel member states to meet the targets of the SDGs, but it can use soft power methods to influence member states to meet the goals. In an

educational imaginary, we look at commonalities of the states who have a vested interest in that space and at commonalities of external forces that could be influencing those actors. Not only is metagovernance a core tenet of CPE, but “metagovernance is particularly applicable to CARICOM since it respects the principles of sovereignty (which speaks to its intergovernmentalist nature) and ‘collibration’ (which includes modes of cooperation and is a feature of its neofunctionalism character)” (Jules, 2016, p. 4).

The educational imaginary examined for this article, the CEPS, currently utilizes a particular instrument – the Ideal Caribbean Citizen – to avoid ideological pluralism. The Ideal Caribbean Citizen, which emerged in the post-ideological pluralist period, is a set of benchmarks created by CARICOM that emphasizes neoliberal ideals within member countries. While not a precise list of standards and benchmarks akin to a curricular model, the benchmarks of the Ideal Caribbean Citizen emphasize skills tailored to a global economy as inspired by the UN’s 2030 Sustainable Development agenda. It essentially balances global needs with regional ideals in that the “Ideal Caribbean Citizen[s] are seen as those who are globally minded but focus on contributing economically to the region’s interests first and foremost” (Jules & Arnold, 2021, p. 6). This helps establish a hegemonic order wherein CPE is created.

### **History of CARICOM’s educational imaginaries**

Institutionalism in the Caribbean involves looking at the nexus of several different educational and economic structures within the region, beginning with CARICOM. The dating of the CEPS educational imaginary can be traced back to CARICOM’s CSME, which was established at the 1989 Grande Anse Conference in Grenada, which sought to replace the preexisting Caribbean Community and Common Market (CCCM). The resultant Grande Anse Declaration “create[ed] the necessary institutions to facilitate the pillars of regionalization” (Jules, 2015a, p. 310). In other words, ideological pluralism drove the movement towards a wider form of economic integration – one not just based on economic cooperation but cultural, political, and societal levels – to create a common educational policy space at the regional level, which is akin to Jessop’s idea of ‘imaginaries.’ We use ‘educational imaginaries’ to refer to the shared educational policy space created by CARICOM, the Caribbean Educational Policy Space (CEPS). Within this space, CARICOM “facilitates the exchange of policy ideas and acts as a multi-level governance institution by addressing issues that have come from the inability of national governments to control global, regional, and transnational policy processes” (Jules, 2015a, p. 310) to engender the Ideal Caribbean Citizen. One of the biggest concerns of the entities within this space is addressing educational stratification among socioeconomic classes. Even to this day, within CARICOM countries, there is an “educational hierarchy between private and public educational spaces, mainly due to the status of the missionary and private schooling in the colonies...this created a stratified system left over from the dominant white hegemonic structures that colonised the region” (Jules & Arnold, 2021, p. 3). This space uses measuring tools to address this through the Free Movement of Skilled Persons Act (FMSPA) aimed at achieving the goals of the CSME.

The FMSPA ensures that graduates meet the basic requirements set out by the act to move and work between member countries without additional visa requirements. The FMSPA categorizes “skilled CARICOM nationals” into categories such as artisans, nurses, teachers, university graduates, sportspersons, musicians, managers, technical and supervisory staff, and media workers and their dependents and theoretically levels the competitive playing field of the job market across the region. The FMSPA is an outgrowth of the Caribbean Examination Council (CXC). Under the Treaty of Chaguaramas of 1973,

CXC is designated as an institution of CARICOM aimed to establish a uniform examination and certification authority across member states. It monitors the Technical and Vocational Education and Training (TVET) and Caribbean Vocational Qualification (CVQ) certificates and is responsible for integrating SDG 4 (education) into CARICOM's education system. These certificates allow the FMPSA to operate; skilled workers qualify under one of the categories after tracking a career path dictated by the CXC.

The Caribbean Vocational Qualification (CVQ) is a certificate earned by students and recognized throughout the region. It places qualified students into one of five categories, or “levels” (NTA, 2021):

Level 1	Directly Supervised / Entry –Level Worker
Level 2	Supervised Skilled Worker
Level 3	Independent or Autonomous Skilled Worker
Level 4	Specialized or Supervisory Worker
Level 5	Managerial and /or Professional Worker

The CVQ is a recognized and portable qualification in CARICOM and “has parallel standing with academic qualifications at same level” and ensures “the development of the Ideal Caribbean Worker” (NTA, 2021, n.d.). Candidates are assessed at the secondary level for competence in the CXC's selected skill area. The CVQ represents “the coordination of technical and vocational education and training qualifications across the region” and is how “CARICOM as a regime has sought to use principles, norms, rules, and decision-making procedures to streamline its functional educational projects” (Jules, 2019, p. 7). Workers with a CVQ are recognized as skilled in their area in all CARICOM countries. Thus, they are now participating in a larger CARICOM educational imaginary, a ‘regime’ wherein CARICOM has control over the labor market of member countries. This is exercised through the more extensive TVET apparatus adopted in 1990 to promote vocational training as the Caribbean region entered a single-market economy. National TVET institutions administer the CVQ in their specialized areas, with students qualifying to attend such institutes before reaching secondary school. In the Caribbean, “TVET is becoming an important component of the regional development project” (p. 5) and has created a larger educational space where the “focus [is] on creating efficient operations of common services and activities for the benefit of the people; accelerating the promotion of greater understanding among the people; advancing social, cultural, and technological development” (Jules, 2015b, p. 5). In the language of semiotics, TVET is part of the construction that creates the educational space that CARICOM operates within.

Part of CEPS's educational imaginary is also created from the international level through initiatives such as the SDGs and the previous World Bank's Education for All (EFA) fund. As previously mentioned, the EFA is an international initiative to improve literacy and access to education in poorer countries and incorporate international goals into the regional framework established by CARICOM. Along with the UN's SDGs-specifically SDG 4, which focuses on education-EFA, transfers international policies to the regional imaginary:

With the opening up of new policy venues such as the Sustainable Development Goals (SDGs), educational transfer in the Caribbean, be it voluntary or imposed, is not only about the transferal of global best practices but also represents the transnational movement of policies and social learning (Jules & Arnold, 2021, p. 2).

### Methodological Terrain

This study conducted a summative content analysis (Saldana, 2016) across nine policy documents concerning Human Resource Development in CARICOM. These policy documents were selected to understand better how educational imaginaries are constructed and function in the CARICOM regional space. This approach draws from Ball (1990), who argues that texts can be understood as both constructed by and constructive of discourse. Additionally, this paper seeks to understand how CARICOM educational imaginaries develop over time. Six texts used in this study date from before HRD education was formally introduced into CARICOM's strategic plan, and three texts date from the introduction of HRD education and subsequent years (Table 1).

**Table 1**

*Policy documents used in this study, year of publication, and publishing body*

Document Title	Publication Year	Publishing Body
CARICOM Human Resource Development 2030 Strategy	2017	CARICOM
Creative and Productive Citizens for the 21 <sup>st</sup> Century (CPC)	1997	CARICOM
Education and Training Policy and Strategy	2017	Caribbean Development Bank
Eye on the Future: Investing in Youth Now	2010	CARICOM
Future of Education in the Caribbean	1993	CARICOM
Strategic Plan for Caribbean Community (SPCC)	2014	CARICOM
Strategic Plan for the Caribbean Community 2015-2019: Repositioning CARICOM	2016	CARICOM
Youth Agenda, Sustainable Development	2003	United Nations
Youth Development Action Plan	2012	CARICOM

Given that CARICOM's CSME was established in 1989, we included official policy documents regarding education and HRD after this date. We examined a corpus of documents from between 1993-2021, when HRD was formally introduced. We then gathered documents from various sources beginning from the formal introduction of HRD in 1993 through 2021. Documents were collected from CARICOM's virtual archive on its website as well as through policy mentions in the existing literature on CARICOM's educational strategies. The texts ultimately included in this study represent policy strategies for HRD from key policy actors and governance bodies identified across existing literature about the region and by CARICOM itself.

The four themes used in this study, structural selectivity, discursive selectivity, agential selectivity, and technological selectivity, were pre-selected from CPE as a valuable

method of understanding how educational imaginaries function at various scales. By pre-selecting themes from our theoretical framework, researchers could track the mechanisms by which educational imaginaries take shape closely. The first theme, structural selectivity, was applied to this case by researchers to mean the social, political, and economic contexts that these policy documents responded to. Discursive selectivity was understood to mean how documents positioned the roles, responsibilities, and functions of governing bodies, people, and strategies. In other words, discursive selectivity explores how these documents select and present narratives about CARICOM. Agential selectivity was applied across these codes to track nodal actors identified in the documents and discussions of their roles or capacities. These codes referred to the influence and positioning of governance bodies, agencies, and key stakeholders. The final theme, technological selectivity, indicated the mechanisms, tools, and strategies by which selected discourse around education were implemented and reinforced. This theme refers to specific practices, routines, and tools that are recommended or used in policy documents to shape educational practice.

The nine texts were coded by three of the authors of this study using a set of codes developed collaboratively. One researcher coded documents that preceded HRD policy, and two researchers coded policies that came after. We began our analysis by open coding all documents and generating an initial set of codes that represented vital themes, concepts, actors, and implementation strategies found in the documents and corresponded to our four pre-selected themes. We then collectively examined the prevalence of concepts generated by open coding across the documents to search for patterns, gaps, and outlying codes. Next, we developed a set of codes that we agreed corresponded to the central ideas in each document and organized them into our four thematic categories depending on how each concept functioned in the document. Table 2 provides a breakdown of how codes were organized under each theme. All three researchers agreed upon definitions for the codes, and codes were developed based on language gathered directly from the texts and through researcher interpretation. Documents were then re-coded using the refined set of codes.

**Table 2**  
*Theme and code organization*

Theme	Code	Code Definition
STRUCTURAL	Global Economy 1	Effects of globalization create a need to strengthen integration efforts, need to address the economy within the region to compete with the global economy
DISCURSIVE	Global Economy 2	References to the need for CSME and CARICOM to produce skilled and competitive workers to compete in the global economy, it is the responsibility of education to produce such workers

	Regional Economy	Addressing the “grave social and economic problem throughout the Region” (CPC, p. 27)
	Labor Market	Direct or indirect references to labor markets, workforce preparation, labor demand, 21st century skills
	Culture	Culture as facilitating regional integration and cohesion, promoting “Caribbeanness” and a sense of regional identity
	Ideal Caribbean Citizen	References to citizenship, any of the ICC traits, good Caribbean citizen or person
AGENTIAL	CARICOM	Interventions, influence, policies, or bodies facilitated by CARICOM/CARICOM branches; references to CARICOM capacity and governance
	CSME	References to strengthening the Caribbean’s capacity to respond to challenges in the global economy, commitment to Caribbean identity – a commitment to CSME/regional economy
	World Bank	References to studies/statistics produced by World Bank, citing World Bank studies as proof of Caribbean’s past education/economic failures
	Regional Development Banks	Interventions, influence, policies, or bodies facilitated by Regional Banks; references to Bank capacity and governance
	Youth as Future Leaders	The Ideal Caribbean Youth (like ICC), discussion of the vital role of youth in the integration of the Region, references to Youth participation being essential and “catalyzing” development potential

	Western Capitalism	Warnings of cultural influence from North American and other “more developed” societies, as a threat to the development of Caribbean cultural identity, need for citizens to evaluate outside sources critically
TECHNOLOGICAL	Monitoring & Evaluation	Drawn from the specific language used in HRD doc, references to systems or interventions that support monitoring or evaluation such as oversight bodies, testing, and feedback
	Media	References to the dissemination of policy, policy goals, programs designed to make the Region aware of the relationship between culture and development
	Standards & Accountability	References to World Bank studies and the need to improve scores, references to regional studies/statistics, the desire to be seen as globally competitive in education, teacher training
	Curriculum Reform	Students concerned about outdated curriculum, the need to increase youth awareness of their role in the regional system, need to create curriculum that will produce competitive workers
	Extra-national governance bodies	World Bank, UNESCO, NGOs, private investment/donors overseeing, funding, or used as a benchmark for policy implementation

CARICOM comprises many different national contexts that may interpret and implement regional strategies in varied ways. Because our study is limited to examining official, regional policy documents, it fails to capture the actual implementation of these strategies at a national and local level. Further research is necessary to gather data on how the

CARICOM educational imaginary functions in practice. Additionally, exploring how these policies are received and experienced by individual educators, students, and school administrators is crucial in understanding local interpretations, understandings, and resistance in shaping imaginaries. However, these questions are beyond the scope of this paper, which seeks to explore how CARICOM governance bodies construct, position, and mechanize educational imaginaries.

## **Findings and Discussion**

This discussion will apply a CPE approach to selected CARICOM policy documents from 1993 to the present. The first section addresses 1993-2014, and the second discusses 2014-present. Using the four modes of selectivity, this section illustrates how the educational imaginary is formed and reconstituted over time in CEPS. While for the purposes of this paper, the modes can be thought of as progressing linearly, moving from structural to discursive, then to agential and technological, it is essential to note that imaginaries and the ideas that constitute them develop relatively freely within this framework, deconstructing and reconstructing bits and pieces of themselves as they move.

### **1993-2014**

#### *Structural*

Across the documents analyzed, structural selectivity can be seen in numerous references to the global or knowledge-based economy. Citing the nature of globalization and the global economy as a significant driving force, many documents take an early first step towards creating the educational imaginary. Phrases referencing global pressure permeate the documents, starting with the Future of Education Policy (FEC). For example, the policy artifacts use phrases like “if Caribbean culture is to hold its own in a world that will become increasingly competitive...” (CARICOM, 1993, p. 21) and “if the Caribbean Community wishes to avoid global marginalization...” (CARICOM, 1993, p. 44). This language situates CARICOM within a broader global hierarchy shaped by economic competition and positions education systems as critical to driving regional economic development.

Structural selection of the global economy continues into the Creative and Productive Citizens for the 21<sup>st</sup> Century ([CPC], CARICOM, 1997), which established the idea of the Ideal Caribbean Citizen. One of the foundational ideas expressed is the need to build “a capacity to respond to fundamental global changes,” requiring the region to develop methods of dealing with “this complex set of challenges” (CARICOM, 1997, p. 7). This theme remains in several youth policy documents as well. For example, CARICOM (2003) notes that “changes in world trade and economics... increased pressure to compete in all productive sectors” and the “unprecedented challenges of globalisation” pressed the region to “achieve sustainable development” in order to remain active on the global stage (p. 2). Additionally, Eye on the Future (CARICOM, 2010) discusses “challenges posed by globalization and trade liberation” and thus immediately establishes the underlying force necessitating the corresponding policy discussion and proposed changes. The Strategic Plan for the Caribbean Community ([SPCC] CARICOM, 2014) follows suit only a few years later, discussing in its introduction the global and regional context of the region at the time, and elaborating that because it existed in a “highly volatile and uncertain global environment” (pp. 4-5), the repositioning of the CARICOM economies (and educational imaginary) faced significant challenges. Every document analyzed between 1993-2014 was founded on the notion that the global knowledge-based economy necessitated policy change in the Caribbean. Moreover, the notion of the ‘ideal type’ of Caribbean citizen that is needed to function in a knowledge-based economy is the backbone of the imaginary.



This notion can be seen as the primary structural selection constituting the educational imaginary. As the next section explains, this underlies the imaginary progression in every document by serving as the basis for the three other modes of selectivity, starting with discursive.

#### *Discursive*

The global economy pervades the discursive mode of selectivity as well, coming up in many places as references to CARICOM's ability to produce skilled workers and citizens capable of competing on the global stage. It is at this point in the four modes of selectivity that education is first explicitly named, with *Eye on the Future* (CARICOM, 2010) claiming that developing a morally stable and productive workforce is "the responsibility of the education and other social systems in the Region" (p. 33). In *CPC* (CARICOM, 1997), the need is stated more explicitly "education is the major mechanism to bring about the necessary transformation in Caribbean Society" (p. 21). The regional economy is also discursively selected in multiple documents, which stress the need to strengthen CSME through education and refer to the "grave social and economic problem throughout the Region" (CARICOM, 1997, p. 27). Another example can be found in the *Youth Agenda* (CARICOM, 2003), expressing the need for "active participation of the Region's population and the Diaspora in regional integration efforts" (p. 2).

The labor market emerges as another theme in discursive selectivity. Closely linked with the global and regional economy, the labor market is discussed at length in every document, emphasizing preparing a skilled workforce and developing 21st-century citizens. For example, the *FEC* (CARICOM, 1993) explains a "need for the development of an entrepreneurial culture as an important strategy for both job creation and economic advancement" (p. 49). Another salient example is found in the later *Eye on the Future* (CARICOM, 2010), which states that a successful single market economy in the Caribbean "requires a highly skilled, knowledge-based workforce that is morally stable, healthy, productive, creative and competitive" (p. 33).

The final discursively selected theme is culture, specifically the pressing need for a cohesive and unifying culture that brings the region's people together. Culture was immediately flagged as essential to the Caribbean policy space in the *FEC* document (CARICOM, 1993), which declared that education should be able to provide citizens with "a healthy concept of self and cultural rootedness which engenders a commitment to the region" (p. 16). The *Eye on the Future Report* (CARICOM, 2010) displayed the continuation of culture as a critical discursive theme. This document more explicitly stated the relevance of culture to the constitution of the educational imaginary, noting that "culture is also the foundation and an effective tool in regional integration, as it is central to the promotion of a sense of regional identity" and urging young people to continue identifying with Caribbean religion, art, and music (CARICOM, 2010, p. 79). It continues that "if culture shapes many of the practices now deemed to be dysfunctional, it holds the promise of being the source of generating solutions" (CARICOM, 2010, 88).

#### *Agential*

Numerous agents are operating within CEPS, all of which play a role in constituting the educational imaginary. These include CARICOM, the CSME, the World Bank, the Regional Development Banks, Youth, and Western Capitalism. All are mentioned in various capacities in each of the policy documents analyzed, but this section will discuss only Youth and Western Capitalism, as they are unique from later documents. The Caribbean Youth were recognized early as important agents operating within the policy space. In its section concerning primary education, the *FEC* (CARICOM, 1993) states that

“shaping the minds of our youth” (p. 12) lays the foundation for development. Later in the document, educating the youth on Caribbean culture is “seen as a critical component of the curriculum with the potential to enable our young people to carve a niche in the world economic and cultural scene,” with the additional goal that “[s]chool should also enable students recognise the possibilities of exploiting our culture for economic development” (CARICOM, 1993, pp. 27-28). The Youth Agenda (CARICOM, 2003) recognizes that “youth involvement in the process of seeking solutions is increasingly considered vital” and that youth are “catalysts of the development potential of the Caribbean” (p. 3). Eye on the Future (CARICOM, 2010) makes a clear point that many well-known artists and intellectuals from the region “were in fact youth when they peaked in terms of their contribution” (p. 80). Later, the document speaks of the extraordinary spirit of the region and that “we forget to our peril that it is our youth primarily that embody this spirit” (CARICOM, 2010, p. 88).

Western Capitalism is also seen as an agent in CEPS; however, it is often discussed cautiously and with a warning. Media studies during secondary education are emphasized as important to the culture of the region so it can “sustain itself and resist uncritical absorption of electronically transmitted material from other cultures” (CARICOM, 1993, p. 15), and to enable people “to evaluate the messages critically from the foreign media” (CARICOM, 1993, p. 17). The document later recognizes that previously, technology had been seen as a “deliberate attempt ... to subvert the Region’s culture by submerging it in and overwhelming it with Hollywood images” but that now (in 1993) “what was being perceived as a regional phenomenon was in fact a nascent global phenomenon” (CARICOM, 1993, p. 44). Eye on the Future (CARICOM, 2010) then recognizes that many leaders warn of the “threat to Caribbean cultural identity posed by cultural influences from North America and other more developed societies” and the fear that morals and values of Caribbean heritage are “being eroded by cultural homogenisation” (p. 82). Western ideals are seen as detracting from Caribbean culture because Youth struggle to “withstand the materialism and individualism embedded in the culture beamed in, especially from the North” (CARICOM, 2010, p. 82). However, the document then goes on to explain that since the “threat from external cultural forces” will not go away “as long as the United States remains the world power that it is,” the region must remain open to these influences and use them to develop new cultural forms that make the Caribbean unique (CARICOM, 2010, p. 82). Such broad statements reflect the region’s expectations to borrow Western educational reforms.

#### *Technological*

The final mode of selectivity found within the policy documents is technological. Through this mode, the mechanical aspects of governance come to fruition and can be thought of as a controlling output of the process of constituting the educational imaginary. The themes that have been technically selected include media, standards and accountability, and curriculum reform. Because this paper focuses explicitly on policy documents, the implementation of these themes is not discussed. However, by examining case studies, further research could concretely demonstrate how various actors use technological themes to constitute the educational imaginary in CEPS. Beginning with the Future of Education document (CARICOM, 1993), media is invoked as the essential method to “disseminate programmes designed to sensitise the Community” (p. 29) about the importance of culture in developing a cohesive region. The document later discusses educating parents about children with special needs and states that “the media can be used effectively to change the attitudes of parents and the society in general towards the handicapped” (CARICOM, 1993, 31). Jumping forward to 2014, media continues to pervade policy documents as an essential mechanism to the educational imaginary. SPCC

(CARICOM, 2014) advocates for "undertaking a comprehensive public education, public information, public relations, and advocacy programme" (p. 31) to strengthen the CARICOM identity and spirit of the Community.

Standards and accountability emerge as a measuring stick for the educational imaginary's success in the global economy. World Bank statistics are often cited in earlier documents, and teacher training is explicitly mentioned as an essential mechanism to ensure educational and economic success. FEC (CARICOM, 1993) cites the need to "develop regional programmes for the training of teachers" (p. 10) in order to develop children who are independent thinkers and to strengthen all levels of education. CPC (CARICOM, 1997) continues this theme of technical selectivity, stating, "perhaps the most crucial challenge facing the education and training system is the inability to attract and retain appropriately qualified staff" (p. 31).

In a similar vein, the curriculum is perhaps the most salient example of a technically selected theme serving to constitute the educational imaginary. Through curriculum reform, the region expresses in nearly every policy document the potential to more appropriately and effectively educate its citizens to compete and participate in both the regional and global economy. For example, FEC (CARICOM, 1993) right away recognizes that "teachers need the guidance of a curriculum which is integrated and centered around the experiences of the children [and] relevant to their culture" (p. 9) in order to do their jobs as educators effectively. The document also contains an entire section devoted to such curriculum reform, which names several sections in particular need of reform, including culture, language learning, and technology (CARICOM, 1993). CPC (CARICOM, 1997) emphasizes, in particular, the need for "teaching how to learn" in order to "shift from education seen as schooling to one of life-long learning" (p. 30). SPCC (CARICOM, 2014) demonstrates a continuation of this technical selectivity, stating that specific focus should be placed on certain areas within the curriculum, such as "innovation and creativity," "teacher preparation," and "greater emphasis on science, technology, engineering and mathematics" (p. 5) in order to meet skills requirements of the labor market.

### **2014-Present**

#### *Structural*

In analyzing structural selectivity in policy documents from 2014-present, the emphasis is most clearly focused on the global knowledge-based economy and the integration and involvement of the region into the broader context. The CARICOM Human Resource Development 2030 Strategy (CARICOM, 2017) is crucial. This document references the global economy and the goal of regional economic integration. A goal of HRD is to "ensure that our Community can fully respond to the United Nations Sustainable Development Goals (SDGs)" (CARICOM, 2017, xiv). In striving to meet the global goals set by UNESCO, the global economy is given priority. Further, HRD explicitly aims to "take on the challenges of globalization" (CARICOM, 2017, xii). In the Education and Training Policy and Strategy document produced by the Caribbean Development Bank (CDB), emphasis on the global economy is presented alongside broader development goals at the international level. "Apart from the Caribbean-specific MDGs, other regional and global developments were considered" (CDB, 2017, p. v). Through these documents from 2014-present, the global economy constitutes the core defining feature of structural selectivity shaping the educational imaginary. This influences and sets the stage for the other selectivities to emerge.

### *Discursive*

In the discursive mode of selectivity, the global economy emerged as another key theme throughout the documents. The documents look to education to create workers for the global economy. HRD calls to “embrace global competitiveness” (CARICOM, 2017, xvii). A key trend throughout the CDB document encompasses the “effectiveness of education and training to create systems that are responsible to national, regional and global labour markets” (CDB, 2017, p. viii). A second discursively selected theme is the regional economy. This theme focuses on the economic and social issues present. “The Caribbean has been underperforming even when measured against other parts of the developing world, including other small island developing states (SIDS)” (CARICOM, 2017, p. 14). The goal to avoid repeating past mistakes was reiterated throughout the documents. Additionally, a desire to “increase efficiency and cost-effectiveness in the delivery of similar or common services across the Region” (CDB, 2017, p. 2) shows the hope to create more efficient educational systems.

The labor market emerged as another discursive selectivity. The HRD discusses the “twelve 21st century competencies and skills for the Caribbean citizen” along with the “top ten skills needed by 2020” (CARICOM, 2017, pp. 23-24). Further, the push for education to prepare people for the labor markets was present, “enhanced efficiency, relevance and effectiveness of education and training to create systems which are responsive to national, regional and global labour markets” (CDB, 2017, viii). Another discursive selectivity is culture, which is defined here as promoting a regional identity. The “seamless” integration of the HRD into people’s lives and the broader “ecosystem” (CARICOM, 2017, pp. 7-9) articulates the desire for the HRD Strategy to encompass multiple levels and aspects of individuals’ lives towards reaching regional goals. Finally, the Ideal Caribbean Citizen is the last discursive selectivity analyzed. This references good Caribbean citizenship according to the vision of the Ideal Caribbean Citizen. Part of the definition of the document’s goals is for better citizenship. Further, the HRD seeks to prepare people for active citizenship, developing regional identity, and preparing for governance participation (CARICOM, 2017). The goals of the CDB are aimed at contributing to the Ideal Caribbean Citizen.

### *Agential*

The agents that function within the Caribbean policy space include CARICOM, CSME, Commonwealth Secretariat, the EU, the IMF, UN agencies, the World Bank, and Regional Development Banks.<sup>10</sup> While there are additional agents at play in the policy space, the scope of this paper analyzes only major policy actors formally engaged in governance. CARICOM creates the HRD; thus, it clearly outlines its ability for governance and its presence in the policy landscape. CDB (2017) analyzes past policy documents and critical events that contribute to the current educational imaginary, citing influential strategies, initiatives, and interventions. CSME references strengthening the Caribbean’s capacity to respond to challenges in the global economy and commitment to the regional economy. The Revised Treaty of Chaguaramas (CARICOM, 2001) is critical in developing skilled workers and their movement throughout the region. As such, “CDB positioned itself to respond more efficiently and effectively to the development challenges faced by BMCs” (CDB, 2017,10) Throughout the documents, references to studies and information produced by the World Bank are incorporated. Further citing World Bank studies as proof of the Caribbean’s past educational and economic failures plays a role in evidence-based practices and future implements. The HRD reports on spending in education produced

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<sup>10</sup>This is not an extensive list of actors, because of the scope of this paper concerns major policy actors and therefore grassroots organizations and middle level civil society actors are not included.

by the World Bank and is identified as a partner in development (CARICOM, 2017). CDB notes the World Bank’s role in co-financing the OECS TVET Project (CDB, 2017).

#### *Technological*

The themes within technological selectivities are monitoring and evaluation, media, standards and accountability, and curriculum reform. Monitoring and evaluation are seen through the systems and interventions that support monitoring or evaluation, such as oversight bodies, testing, feedback. For example, UNESCO uses technological selectivities such as online data collection tools and online resource banks to assist schools in achieving SDG 4. There are a series of protocols for monitoring and evaluating within the HRD document. Project, strategy, and performance evaluations will occur in 2024 and 2029 (CARICOM, 2017). A goal of the CDB strategy is to support the assessment, access, equity, and participation of education (CDB, 2017, p. vi). Further, strategies for intervention and a review process are embedded in this document (CDB, 2017). Media serves as another theme of technological selectivity and refers to disseminating policy, policy goals, and programs. In the HRD, there are five modules for implementation and schedules for progressing towards goals where communication and interaction are identified as a principle to success (CARICOM, 2017).

Standards and accountability track the progress of the educational imaginary in the global economy. HRD articulates “standardized skills certification and accreditation” (CARICOM, 2017, p. 26), which are necessary for the movement of skilled workers throughout the region. CDB works to create a culture of accountability in policy governance (CDB, 2017, p. 20). Another technological selectivity is curriculum reform, which seeks to promote the methods of instruction and content that prepare students for life beyond school. HRD describes the need for “learner centered design of curricula” (CARICOM, 2017, p. 3) “effective teaching” (CARICOM, 2017, p. 8), “multiple pathways for students to be exposed to and help prepare students for different career paths” (CARICOM, 2017, p. 42). In this way, the curriculum provides routes for student success. CDB (2017) articulates the need for “high standards which are clearly understood and agreed by all stakeholders, including students and parents; a culture of accountability and transparency; and reliable data on the performance of the education system” (p. 20).

Lastly, extra-national governance bodies contribute to the make-up of technological selectivities. These include organizations such as the World Bank, UNESCO, NGOs, and other private investment/donors overseeing, funding, or used as a benchmark for policy implementation. The HRD considers policies from a variety of global education players and partnerships such as Commonwealth Secretariat, Commonwealth of Learning (COL), the EU, Global Affairs Canada (GAC– formerly DFATD/ CIDA), UNICEF, UNESCO, USAID (CARICOM, 2017). The key themes that emerged within each of the four selectivities work in various ways to constitute and reinforce the educational imaginary of the CARICOM educational policy space.

#### **Conclusion**

The CPE approach presented above examined ‘how’ and when educational imaginaries are constructed and investigated, ‘who’ is involved in their development, and ‘what’ issues emerge. The existing small (and micro) states literature focuses on how trans-regional bodies (like CARICOM) are seeking to navigate the particular economic vulnerabilities typically associated with small states that arise out of colonial histories/continued Western hegemony (e.g., reliance on a single export or tourism and are increasingly precarious with climate change etc.). As such, our findings reveal that

CARICOM's educational imaginary is informed and shaped by neoliberal processes and logics emphasizing economic competition and increasing input from supra-national bodies such as UNESCO and the World Bank. At the same time, our findings indicate the increasing presence of regional entities in CEPS as time goes on and a recognition of the tensions that arise at the intersection of global pressures and local contexts. CEPS is structurally responsive to the global economy and deploys capacity for economic competition as a benchmark of success. CARICOM discursively aligns its educational goals with its economic ones by focusing on labor market needs and positions education as the Ideal Caribbean Citizen's arena. CEPS educational policy is shaped by a mix of supra-national and regional agents that are increasingly involved in education governance. CARICOM uses neoliberal technological mechanisms such as standards, accountability, and evaluation to institutionalize its regional agenda. This analysis reveals that CARICOM selects one particular interpretation of regional needs that shapes and is shaped by an interplay of global and local considerations.

Educational imaginaries are being continuously deconstructed and reconstituted through variation, selection, and retention. By analyzing selection, and the four modes of selectivity (structural, discursive, agential, and technological), one can trace the formation and perpetuation of an educational imaginary within a specific policy space. CARICOM provides a salient example of such a process; the development of the Ideal Caribbean Citizen and Human Resource Development initiatives since 1993 demonstrates the various ways in which ideas are prioritized, selected, and promoted by powerful actors in order to create an educational imaginary. Through the lens of CPE, CARICOM demonstrates how regional governing bodies position education as central to economic goals in light of a competitive and global knowledge-based economy, made up of often vulnerable state and regional entities. Because this paper exclusively examined policy documents, its findings remain chiefly theoretical. However, we suggest that by analyzing the educational imaginary in concrete, real-world terms such as case studies of student learning outcomes, further research could better illuminate the nuances of CPE and educational imaginaries.

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# International Doctoral Students Negotiating Support from Interpersonal Relationships and Institutional Resources during COVID-19

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*The COVID-19 pandemic has greatly affected international students around the world. Chinese international students are challenged in their daily life and study due to the travel restrictions, disruption of research, closure of labs, and the rise of anti-Asian racism. This study investigates the challenges, especially psychological ones, faced by international doctoral students from China studying in the United States. and explores how their social networks and support systems help them navigate their life and study during the pandemic. In light of social networks and support theory, we interviewed 20 Chinese international doctoral students studying in the U.S. and found that falling in between intimate relationships and student-institution relationships, academic departments and advisors are able to provide all types of support, namely, instrumental, informational, and emotional. Their ability to provide emotional support was heavily overlooked, especially during a global crisis. Concerted efforts must urgently be put together to deal with the mental health of international doctoral students on campus and rebuild a supportive and hospitable U.S. higher education system. This study can contribute to the scholarship of international higher education by capturing international doctoral student experiences and perceptions in this crucial time and assessing higher education institutions' capability to support international students.*

*Keywords: social support, international doctoral students, COVID-19, institutional response and support, American higher education institutions*

## Introduction

Since the outbreak of the COVID-19 pandemic, the higher education system has been hit particularly hard and Chinese international students are among a few student groups that have been greatly affected. A nationwide travel ban took effect in January 2020, in which non-U.S. citizens who have been to China in the past 14 days were not allowed to enter the country (Griffiths, 2020). The geopolitical tensions between the U.S. and China have also been intensified. In May 2020, a proclamation restricting the entry of Chinese graduate students and researchers connected to China's "Military-Civil Fusion (MCF) Strategy" was issued (Institute of International Education, 2020). Since June 1st, 2020, more than 1,000 visas from students and researchers have been revoked (Griffiths, 2020). Many Chinese students, especially those in STEM majors, reported that they may not be able to return home for many years due to practical concerns such as the inconvenience

of traveling and the high risk of having their visa revoked and thus their student status canceled.

Chinese international doctoral students are also challenged in their daily life and study. Research of doctoral students, especially those involving in-person fieldwork, is found in urgent need to be redesigned and rescheduled due to the shutdown of labs and public places. In Levine et al.'s (2020) focused group discussion, they found that doctoral students expressed their appeal for more funds, more senior-level guidance, and clearer expectations from the institutions. Also, past researchers have documented whether and how students' physical and psychological health are challenged. More than half of the students investigated in Inci and Danielle's (2021) survey on graduate students' well-being expressed feeling lonely, anxious, and fearful in March 2020. Villani et al. (2021) found in a cross-sectional survey that 35% of college students during traumatic events were classified as anxious and 72% were depressed. They related this occurrence of anxiety to the impossibility of physically seeing friends and partners and being distant from colleagues.

Moreover, the pernicious, yet hidden, xenophobic acts have been magnified since the outbreak: due to the rise of anti-Asian racism as the virus began to spread across countries, Asian people are becoming a feared, blamed, and harassed group (Gover, Harper, and Langton 2020). President Trump's insensitive reference to COVID-19 as "Wuhan virus" and "kong flu" may have aggravated Sinophobia, an intersection of fear and hatred of China, as well (Guardian News, 2020). These statements shaped not only the global understanding of this pandemic but also public memories of such disease as part of cultural genes, eventually being embodied in the negative stereotype of and the indiscriminate attacks against all members of Asian communities.

The recent Institute of International Education (IIE) reports evaluated the effects of COVID-19 on higher education institutions (HEIs) and international students and documented that only "a small subset of" overall Chinese international students are affected and all HEIs have taken actions to support international students (IIE, 2020). IIE's conclusion, leaving individual student's voice unheeded and misunderstood, drastically underestimated the negative impact on every individual's life. Additionally, doctoral students were uniformly left out in past studies and the role of higher educational institutions in hosting international students was seldom mentioned.

Many researchers (Zhang & Xu, 2007; Gebhard, 2010; Meriella, 2012) falsely attribute the difficulties that Chinese students experience to their incapability to adapt to a new culture, which is problematic because they not only reinforced negative stereotypes but also ignored the institutions' responsibility of recognizing student hardships and of creating a diverse and hospitable enough campus climate. Thus, this study aims to understand international doctoral students' experience and how they use their social support system during the pandemic. Institutional level response and support is a focus of the study analyzing students' social support system. Research questions that guide this study are 1) what is the impact of COVID-19 on international students' psychological well-being? 2) how does the social support that international students receive or seek might affect their experience during COVID-19?

Considering the intractable combination of COVID-19, COVID-related national policy, and neo-racism and the fact that the literature has shown the fragmented nature of Chinese doctoral students' perspective, it can be argued that investigating and understanding their experiences, especially the negative ones, are greatly needed to

ensure their satisfaction and give institutions much-needed insights to help them adjust their policies by the next global crisis. In this study, social support theory is used to guide our conceptualization. We highlight student agency in seeking and receiving help and in navigating social support resources. In this process, higher educational institutions' role is critically assessed. This study has potential implications for higher educational institutions in recognizing and better catering to student needs and interests.

### **Conceptual framework**

Borgatti & Halgin (2011) describe a network as "a set of actors or nodes along with a set of ties of a specified type...that link them." Unlike groups, networks do not have natural boundaries or internal connections, holding a fluid and ever-changing quality. Students seek or receive social support from their social networks.

### ***Social support***

Social support is "the comfort, assistance, and/or information one receives through contacts from one's social network" (Wallston, Alagna, DeVellis, & DeVellis, 1984). Members of an individual's primary group, such as family members, friends, and significant others, are frequently considered immediate sources of support. People may also draw support from their secondary groups, in which relationships are more regulated or hierarchical. Relationships within schools and organizations are examples.

Social support requires the existence of social relationships, with their structure, strength, and type determining the type of social support available. The behavioral categories of social support, according to House (1981), are instrumental, informational, and emotional. Instrumental support refers to the provision of materials or assistance with practical tasks or problems. Informational support includes giving advice or providing information that may help a person solve a problem. Emotional support involves the expression of sympathy, caring, esteem, value, or encouragement.

From a structural perspective (Feeney & Collins, 2015), the size of the network may impact psychological well-being through the resources and opportunities that supporters provide. Individuals with larger support networks may have more opportunities to engage in beneficial social activities that are also conducive to healthy mental states. On the contrary, social isolation and lack of social support have been found to have an adverse effect on mental health and maybe that on physical health, insofar as mental is important for the physical. Kuo and Tsai (1986) demonstrated that levels of social support could be negatively correlated with stress and depressive symptoms, increasing the risk for suicidal behavior.

It has also been demonstrated by Wang and Miller (2021) that social support can mediate the association between optimism and stress in individuals who have experienced a traumatic event. In addition, empirical research has established that it is not the direct support that buffers the effects of stressors but its perceived availability. Zimet al. (1988) stated that perceived support from family, friends, and significant others was negatively and significantly correlated with the level of depression. This underscores the relevance of investigating how the perceived abundance or lack of social support may work during the COVID-19 pandemic, especially when the evolution of this global crisis is uncertain and may have long-term effects on students' physical and mental health. Thus, this study analyzes international doctoral students' social networks and how they make making their networks and navigate in their networks to deal with the COVID-19 pandemic.

### ***Interpersonal Relationship***

A good interpersonal network within a certain period determines to a large extent the level of international students' life satisfaction and study efficiency (Li, 2013). A large body of research (Rienties et al., 2013; Montgomery & McDowell, 2009; Hendrickson et al., 2011) found an inclination of international students to form social networks with people originating from the same national background. They come to a consensus that relationships with students from the same country form friendships more easily and cultural similarities, along with shared experiences of being in a foreign culture, bring them together. Also, as the interpersonal network, as well as the contact between relatives and friends, is inevitably affected by objective factors such as distance and time difference; it is not uncommon to find the fade of the original interpersonal network of international students and the expansion of their new friendship circles, which is usually achieved through participation in club activities and smooth communication with locals and various departments of the school (Zhong et al., 2020). Unfortunately, however, these ways of improvement were greatly impeded by the COVID-caused social distancing and lockdown, posing enormous challenges for international students.

### ***Mentor-Mentee Relationship***

Mentoring is founded on the relationship between the mentor, as a more experienced professional, and the mentee as one who is learning about the profession. Mentors, going beyond supervising, play a crucial role in both the personal and professional growth of their mentees. Whether or not the mentor-mentee relationship is productive is underpinned by a variety of factors, ranging from the mentor's and mentee's personal and professional qualities (Rippon & Martin, 2006) to the environment or context in which mentoring operates (Rothman, 2007). In turn, Gormley (2008) found that obstacles to successful mentoring relationships mainly involve a mentor's lack of skills and knowledge, poor interpersonal skills, and insufficient two-way communication. Bradbury and Koballa (2008) identified the power dynamic between the mentor and the mentee as the main source of tension in mentoring relationships, where the mentee "may be unwilling to question the practices of the school or mentor teacher for fear of fracturing the relationship or affecting the mentors' evaluation of their progress" (p. 2135).

### ***Student-Institution Relationship (SIR)***

In higher education literature, the term student-institution relationship refers to the interaction between the college environment and the students. It is also often considered as a legal term regulating "the limits and nature of a college's legal responsibility for and jurisdiction over the student body" (Boyd, 2010). Williams (1986) proposed the concept of fit – "the congruence in values, style, and preferred characteristics between the student and the institution" (p.1). He argued that the effect of fit drastically shaped a students' attitudes towards as well as academic performance within the institution. Further, interventions made by the institutions to be responsive to student needs and interests, as claimed by Williams, could improve a students' sense of fit and satisfaction.

This study is conceptualized by the theoretical perspectives of social support and social relationships. The social networks that students seek or receive social support from can be thought of as gradated rather than binary, resembling ripples emanating from the individual or a concentric circle with the individual self in the center. Each ring, radiating outward, represents a reducing level of social connection or support and an increasingly stronger level of trust, mutual understanding, and care.

## Methods

This study adopts the in-depth phenomenological approach that focuses on “the experiences of participants and the meaning they make of that experience” (Seidman, 2012, p.16). We seek to understand our participants’ subjective reconstruction of their lived experience, while we acknowledge the positionality of researchers. This study was designed to be inclusive of Chinese doctoral students currently studying in the US. We sent out 300 interview invitations to several Chinese international student social media groups and eventually conducted 20 interviews in June of 2021. To keep participants anonymous, Table 1 presents some basic statistics of participant information.

All the interviews were conducted for about 90 minutes in Mandarin. We asked participants to share their experience amid COVID-19 in important aspects of their international study, life, and career trajectory in the U.S. Questions also include how interviewees’ institutions respond to Anti-Asian movements and what kind of support they provide their students with. Interviews were then transcribed, coded, categorized, and analyzed. Both organizational categories and theoretical categories were made and analyzed (Maxwell, 2013).

**Table 1**

*A breakdown of participants’ information into gender, year of Ph.D. study, broad fields, and institutions*

<i>Gender</i>		<i>N</i>
Female		10
Male		10
<i>Year of Ph.D. study (2019-2020)</i>		<i>N</i>
First-year		2
Second-year		3
Third-year		5
Fourth-year		5
Fifth-year		4
Sixth year		1
<i>Broad fields</i>		<i>N</i>
Humanities		5
Social Sciences		2
Life sciences		3
Physical sciences		8
Engineering		
<i>Institution</i>	<i>State</i>	<i>N</i>
UCs (UCB, UCLA, UCSD, UCSF)	CA	4
Claremont Graduate University	CA	2
Caltech	CA	1

Princeton University	NJ	1
MIT	MA	2
Harvard University	MA	2
New York University	NY	2
Boston University	MA	1
University of North Carolina at Chapel Hill	NC	1
University of Pittsburgh	PA	1
University of Maryland	MD	1
Columbia University	NY	1
University of Texas at Dallas	TX	1

## **Findings**

This section will draw upon the main themes and present the findings arising out of the interview process and subsequent data analysis that was carried out. But before we present the themes, we consider it important to acknowledge the interviewees' emotions during the COVID-19 pandemic, as the themes are all somehow interconnected with and lean heavily towards an emotional nature.

### ***Personal Psychological Well-being***

Not all people were capable of responding to the rapid changes during the COVID-19 pandemic with ease and positivity. International students, to be specific, are amongst the most vulnerable groups of all kinds (Yilmazli Trout & Alsandor, 2021). Emotions that they experienced are complex and slight occurrences frequently disturbed the balance of their minds. Words such as "anxious," "stressed," "frustrated," "fearful," "worried," and "depressed" were used by almost all interviewees. Some also used "angry," "disappointed," and "discouraged". Take, for example, this field note passage of a 4th-year Ph.D. student majoring in computer science describing his feeling of helplessness and loss of control when talking about future possibilities of legally staying in the U.S.:

Before, I felt that there was a choice, but now I feel that there is no choice or that the choice is in the hands of others.

For students who were in their last year of Ph.D. study, it is not uncommon to observe extraordinary academic stress. For example, a fifth-year doctoral student attributed this to his failure to create separation between work and home.

The epidemic [pandemic] leaves you nowhere to go or get a state of rest. Scientific research, in my opinion, is supposed to be constructive. It may last for a while and then you rest for another period of time. During that time, I used to go out and refresh myself to regenerate my enthusiasm for research. But now you are working almost every day. It is a kind of chronic and long-term pressure, unreleased.

Some others revealed severe damage to their psychological well-being. As a 3rd-year Ph.D. student studying engineering put it:

Before the epidemic [pandemic], there are many activities to choose from and many people to contact, many things can be resolved in time, and pressure can be released in time. But quarantine piles up annoyance and pressure, leaving them unresolved.

I was unable to contain my own destructive feelings. It was also difficult to discipline myself. I felt depressed.

While many of them were and are still trying to navigate their path forward and it might not be salient to notice an apparent breakdown in their lives, these words are representative of the hidden, but pernicious, hardships that international students encountered. The findings from the thematic analyses will provide more insight into the various reasons for these feelings.

#### ***Relationships with Family, Partners, and Friends***

As a consequence of the tight lockdown in early 2020, a large part of the participants' interview was located around isolation and the corresponding loneliness that came with it. They related this increased isolation to social distancing requirements, fear of being infected by the COVID-19 virus, and large amounts of online communication. While some reflected on "relying on the video calls with friends to live," others felt increasingly disconnected from the real world. Many were also experiencing a hard time having normal social activities. As is clear in the following excerpts:

April 2020 was the loneliest. Everyone worked from home. Seminars were canceled. And many of my friends returned to China. So I didn't see anyone for weeks. This is quite unhealthy, nor is it how Ph.D. is supposed to go. What worries me, even more, is the difficulty to build up trust. For example, I am careful not to be infected by the virus, but I cannot guarantee that other people do so.

For some participants, parents were a source of concern and emotional labor, as they tried to arrange care from a distance or simply were worried about the health and safety of family far away. Four of the participants dealt with a strong feeling of homesickness, "spending thoughts on missing family members" and "dreaming about returning home." One participant, in particular, was going through a tremendous family crisis amid the COVID-19 as his family members were trapped in Wuhan and one is a doctor.

On the contrary, some reflected on experiencing continuity in the quality of their existing interpersonal relationships or even increased relationship closeness during the pandemic. For some, this involved having family and friends being on the same page and supporting each other as they go along:

My relationship with my friends has become closer. We've been chatting and complaining about various challenges we faced. Now we are the support network for each other. It's nice to have someone to talk to.

Interestingly, not all participants longed for intimacy, especially during the pandemic when social distancing is deemed necessary. Some were fearful of being affected by their roommates, others had an increasing number of dormitory conflicts since they were forced to stay together all the time.

#### ***Connections with Lab Mates, Cohort, and Advisors***

The possible adverse impact that COVID-19 left on research and academic progress was another key concern that many of our participants held. As strict regulations regarding school entrance were imposed shortly after the pandemic outbreak, students were forbidden to return and forced to shift to the work-from-home model. Staying motivated and productive was tough, but whether working from home is the key or impediment to their efficiency remains unclear. Participants reported that the pandemic had affected



their connection to other students and advisors, speaking about the difficulties and inconvenience in creating smooth academic communication and the excessive cost of time and energy while doing it. A fifth-year Ph.D. student in life sciences elaborated:

The small talks after in-person seminars have been an important opportunity for me to learn and develop ideas. Now as they go online, not only did many people stop turning on the camera at all, they also ghost out immediately. It is also difficult to concentrate all the time when zooming, and sometimes it is difficult to hear.

Several participants, especially those who rely on in-person fieldwork or wet experiments in laboratories, experienced rapid change in their research design and severe delay in their research progress. One participant described a special circumstance in March 2020 where laboratories were shut down and all experimental animals like rats were deemed to be killed. Another participant observed the idleness of his classmates, who had nothing to do but “spend 10 hours a day playing switch games.” Similar points were made by other participants as well:

My research should have been done last summer. I was about to return to China in July but couldn't. In that case, it was neither impossible to design nor to carry out an experiment online. So, I changed it into a hybrid format.

In this case, lab and department seem to be the immediate superior that the students could reach out to. But people's satisfaction level with corresponding sub-organization support varies. In relation to instructional support, such as graduation postponement, some participants stated that their supervisors were supportive and showed understanding towards that. In some cases, the examination system was also made flexible in various ways, which was a relief to those who were about to take the exams:

Because of my own reasons, my work efficiency has dropped a lot and I also have a little depression. I discussed with my supervisor about half a year off from school, he expressed understanding and said that I should take care of my health.

However, many other advisors did not seem to beware of the emotional fluctuations that their students were going through, resulting in a strained student-mentor relationship:

My boss said to me, he encountered the 9/11 incident when he was a student. He thought at that time, everyone thought everything was over, but now it's pretty good. I think the two things are not the same, but I didn't argue with him directly.

Another participant reported feeling ashamed and uneasy rejecting her supervisor's research request due to personal problems:

At that time, I felt that I was really unable to work, but my boss wanted to talk to me about academics or ask me how well my paper was written. He didn't do anything wrong, but I had no mental space to do that. I feel quite uncomfortable and that it is inappropriate for me to do this. I should have been ready for research anytime, anywhere.

One participant drew on receiving rather sufficient personal support from staff but inadequate systematic ones:

My mentor takes the initiative to ask me if there is anything I need help with. The program officer also cares about my difficulties. As specific people, they are willing to offer support. But they somehow cannot fully represent the department.

Consequently, this delay or overall pivot in research projects and not being fully supported by the department might become an impediment to graduation, which helped increase these participants' level of anxiety. "Perhaps my biggest anxiety comes from not being able to graduate on time," a student remarked.

### *Perceived Support from Departments or Universities*

In turn, participants emphasized their need for institutional resources in their professional contexts to support them in planning for changes to their research due to the impact of the pandemic. They also highlighted that the speed and efficacy of institutional response to major events play a pivotal role in assisting them both in life and in academia. This interest in institutional support ranged from providing more funds, psychological service, timely notification of events and policies, to increased flexibility in research and graduation.

There are a group of participants who did not show particular care about school policies, one of which indicated that it was because of his close connection with his supervisor. There is a consensus that the informational support that the schools provided was roughly adequate. Many shared that their schools did their best in staying with international students and protecting their interests by sending multiple statements via email. For one participant, in particular, he recounted that his school "reported issues of equal rights and the epidemic in a very timely manner, attaching great importance to the timeliness and correctness of information communication."

Instrumental support was also regarded as basically satisfactory. Some participants recalled being offered an opportunity to have their invoices reimbursed. Others acknowledged that a pandemic relief fund was issued at the beginning of the epidemic, which was no more than a few hundred dollars, but still "better than nothing." A fifth-year Ph.D. student in life sciences added:

I personally feel that my school is doing a pretty good job. When the epidemic first started, we had an opportunity to apply for five hundred dollars if we find that COVID has brought a burden to our life. If you're working from home and need a printer, or you want to go home, but the air ticket has increased a lot, you can also apply for some funding.

Similarly, a third-year student studying economics from a large public university felt supported seeing his school's response to visa-related policies:

I remember that there was an incident that if you can't enroll in an in-person class, your F-1 visa will become invalid. That time I felt that the school was pretty awesome. They sent some news updates and participated in some lawsuits. But because the matter was over quickly, there was no follow-up.

However, it is important to note that, while some were relatively satisfied with the resources that their universities provided, others indicated an absence of emotional support, as a student revealed, "public schools are usually financially tight so they can only do some basic things such as notifications, but there was nothing more." Others also expressed their disappointment towards the inadequacy and inaccuracy of the

institutional responses provided by their universities, especially compared to their previous undergraduate and graduate universities:

The so-called free consulting service set up by our school for graduate students is actually not free. And if you go to school more often, he will tell you that if you have specific needs, for example, if you have a history of this kind of mental illness or something, we suggest you go to a doctor outside the school because our resources were reserved to undergraduates. I felt very sad when I heard that.

The anti-Asian wave that came together with COVID-19 also heightened our participants' fear of being physically hurt and trailing emotional stress of not having their rights upheld. Many of our participants recorded being treated unfairly and an avoidance of responsibility of their schools:

For the Anti-Asian acts and crimes, my university's response is much slower. We wrote to the international center, but they did not reply and shirked their responsibility to other departments. When they finally did it, the resources were not displayed on the homepage. You have to click on several indistinguishable links. It hurt everyone's feelings.

The data analysis above revealed the sophistication and complexity of the experiences of international doctoral students. This further indicates significance in recognizing individual differences, creating channels of communication, and providing valid institutional support. That said, the extent to which COVID-19 and the international situation will impact institutions' ability to offer support and the nature of studying and working abroad (change the choice of students who planned to stay in the U.S. in the past) is yet to be fully explored.

### **Discussion and Conclusion**

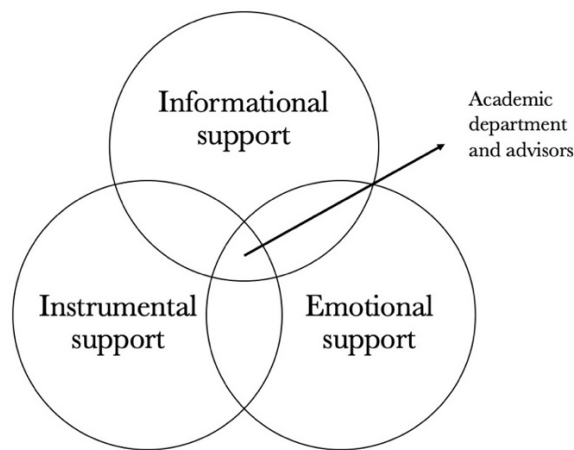
In this section, we discuss three major aspects of the findings: international students' reliance on past interpersonal connections, lack of essential support from institutions, and the role of advisors and departments in providing all types of support.

First, the findings of this study have proved that international doctoral students from China are much more likely to be reliant on close relationships, rather than secondary groups or society. Past studies on the friendship network of international students found international students socialize the most with peers from the same home country (Rienties et al., 2013; Montgomery & McDowell, 2009; Hendrickson et al., 2011). The findings acknowledged this point and found that lab mates are also a significant part of Chinese doctoral students' interpersonal networks during COVID-19. However, the previous interpersonal connections were also seriously fragmented during the pandemic. COVID-19 and social distancing policy have made maintaining or building interpersonal relationships incredibly difficult for the students. That is part of the reason why most of them relied heavily on their past networks, which is manifested by the fact that several participants were seeking comfort from their family members and old friends back home. Lack of regular social activities and consistent channels to communicate left the students with a greater sense of loneliness. In addition, the lack of mutual understanding between students in the US and families in China, affected by the different stages in COVID-19, conflicting media discourses, and the sociopolitical pressures between the US and China around the pandemic, has contributed to students' loneliness in the US and triggered more worry about their parents at home.

Second, the support provided by family members, close friends, and significant others was found to be only emotional, sometimes informational, as is in alliance with the social support theory, whereas the resources provided by higher educational institutions, theoretically informational and instrumental, were very limited. Investigating into what institutions did to confront critical issues created by COVID-19, it is not uncommon to find that many types of resources were in scarcity. Some of those mentioned by our participants include legal aid, financial aid, psychological counseling, and potential change in qualification modality. Also, not only was information such as chances to get relocation fees hidden in “countless web links”, institutions also seldom proactively reach out to the students, leaving them uninformed. But this does not mean that the efforts that have been made were effective. The biggest issue was that the support provided was symbolic rather than practical. Without going beyond updating COVID-related information, institutions fall short in solving real-life problems as well as protecting the emotions of international students of color in the wave of Asian hate. In particular, a common feeling of being left out was expressed by many of our participants, who would want their universities to be responsible for raising people’s awareness of emotional needs and nurturing an atmosphere of mutual support. When looking into the reason why students were somehow reluctant to be dependent on institutions, we found a lack of understanding and trust between them and the students, without which social support networks might be hard to form and manage and students’ attitudes towards the institution might be negatively affected.

**Figure 1**

*The role of the academic department and advisors in providing all types of support for international students*



Third, what falls between intimate relationships and institutions is academic departments and their faculty. It is interesting to find that, in many cases, students seek emotional support rather than informational or instrumental support from their advisors and departments. The department is at the intersection between the larger discipline and the local HEI. Departments are basic organizing subunits within an HEI and administrative extensions of the institution. However, the varied organizational structures and cultures across departments such as policies and values also reflect the influences of the larger discipline and society (Clark, 1987; Lee, 2004). Academic departments and advisors, intersecting at students and institutions, could in fact provide all types of social support, namely, instrumental, informational, and emotional (Figure 1). Individuals, academic advisors and tutors could cater to the needs of students on a personal level. As members

of the subordinate body of the university, they hold a variety of resources at hand and could therefore act quickly to emergencies, providing instrumental and informational support when needed. As acknowledged in previous research (Gormley, 2008), a successful mentor-mentee relationship requires the mentors to go beyond the professional, or academic as in this case. One of our participants revealed that both her mentor and the program officer were willing to offer help and ready to talk her through any challenges she might be facing. Unfortunately, however, those that could be identified in this study are more at the individual level than at the institutional level. This further indicates a lack of systematic support in many higher education institutions and an unprecedented opportunity to redress this issue. As such, departmental support should be systemized, as it plays an irreplaceable role in creating a safe, supportive, and protective educational setting and in bridging the students and the institutions.

This study has several implications. First, it contributes to the scholarship of international higher education by researching and capturing international doctoral student experiences and perceptions in this crucial time. Second, unlike the past studies that place the burden on international students to overcome the challenges during their overseas study, this study focuses on examining whether HEIs have the capacity to provide a safe and supportive environment for international students in a global crisis. It gives voice to international students and provides HEIs with students' evaluations of institutional response and support. A chronic lack of trust and organizational support, which includes culturally and ethnically diverse training to school counselors, are exposed and exaggerated, resulting in their insufficiency in toolset and mindset to deal with the hardships that both themselves and their students experience. Concerted efforts must also urgently be put together to deal with the mental health of international doctoral students and rebuild a supportive and hospitable U.S. higher education system. Third, this study reveals some emerging patterns in international student mobility, especially doctoral student mobility from China. For the post-pandemic situation, one point that deserves mentioning is that the geopolitical tensions between the U.S. and China may change the decision-making of prospective international students from China.

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# Using “Positioning” Theory to Analyze a Female School Teacher’s Experiences with Care Work during COVID-19 in India: Towards Decolonizing Feminist Research

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*The past few decades have been marked by growing awareness about the need to move beyond Anglocentric/Eurocentric epistemes, to instead engage in intellectual projects that effectively (re)present the voices and consciousness of marginalized populations (Manion & Shah, 2019). The term decolonizing research methodologies has thus come to acquire a central place within feminist research in the field of Comparative and International Education (CIE), with rallying calls to foreground the complexities and uniqueness of the lived realities of women through non-hierarchical and non-dichotomous modes of meaning-making (Lugones, 2010). However, methodological literature on decolonizing feminist research is largely linked to the data collection phase, with limited engagement with how to effectively analyze data once it is collected. This study demonstrates the use of positioning theory, a form of discourse analysis, as a decolonial analytical framework to investigate the micro details of a female school teacher’s experiences with care work during COVID-19 in India. The analysis revealed the shifting, often contextual nature of the identities that the participant claimed for herself throughout the narrative, such as a pampered daughter, critical observer, adjusting daughter-in-law, guilty mother, and strategic choice maker. The study ends by making a case for the potential use of positioning theory towards decolonizing feminist research because of its ability to draw attention to the multiple and/or contradictory identities that participants claim for themselves throughout the discursive interaction.*

*Keywords: COVID-19, care work, positioning theory, discourse analysis, decolonizing feminist research*

Even before COVID-19, women across the globe were performing a majority of the care work at home, with Indian women spending maximum hours globally, next only to Mexican women (OECD, 2018). The pandemic pushed billions of students out of school, intensified the care work needs of old members, and placed an inordinate burden on health services; exacerbating the already high burden of care work on women across the globe (Policy Brief: The Impact of COVID-19, 2020; Power, 2020). This intensification of care work had an impact on the nature of women’s participation within the formal economy, with many dropping out of the workforce (Jorge, 2019), and for those who continue to work from home during the pandemic, the responsibilities of juggling work and family simultaneously is an arduous task (Alon et al., 2020).

While the pandemic exacerbated women’s care work responsibilities, the sudden transition to online teaching with limited professional development had a huge impact on

the millions of school teachers working across the globe. Studies from across the globe reported burnout, exhaustion, increased frustration, lack of support from the organizations, and internet issues, such as lack of access and/or limited connection, as some of the challenges that school teachers faced (Arora & Srinivasan, 2020; Joshi et al., 2020; Niemi & Kousa, 2020; Onyema et al., 2020; Pellerone, 2021; Pressley, 2021; Van der Spoel et al., 2020). Female school teachers were subsequently pushed into a space where they had to navigate the increased care work burden inside their homes with the sudden transition to online teaching. This study reports the findings based on a “positioning” analysis of the narrative of a female school teacher’s experiences with care work during the pandemic in India.

The aim of this study is twofold. Firstly, it seeks to go beyond a dichotomized understanding of the identities of women from the so-called “Global South”<sup>1</sup> as victims and/or rebels (Mohanty, 1988) to instead explore the dynamic and contextual nature of their identities, with specific reference to a female school teacher’s experiences with care work during COVID-19 in India. The study is subsequently guided by the theoretical framework of decolonizing feminist research, which goes beyond categorical, hierarchical, and dichotomous modes of knowledge-making (Lugones, 2010) pervasive within Anglocentric/Eurocentric episteme to instead explore the complexity and uniqueness of a female school teacher’s experiences during COVID-19.

Secondly, the study seeks to demonstrate how *positioning* theory, a form of discourse analysis, can be used as a viable methodology towards the aim of decolonizing feminist research within the field of Comparative and International Education (CIE) because of its emphasis on the multiplicity of ongoing, fleeting positionings during the discursive interaction (Deppermann, 2013, p. 4). Narratives within positioning theory are seen as imaginative spaces where participants exercise agency in drawing up their own position vis-à-vis the master narratives (pre-existing socio-cultural forms of interpretation) that seem to position them (Bamberg & Andrews, 2004b). Positioning theory thus provides a useful analytical lens to investigate the “micro details” of the participant’s identity as it is shaped from moment to moment within her narrative (Bucholtz & Hall, 2005, p. 591). The specific research questions that the study seeks to answer are as follows:

1. How does a female school teacher from India position herself and others when narrating episodes linked to care work during COVID-19?
2. How is the participant’s identity as a caregiver expressed in the narrative she tells about the pandemic?

An understanding of how the teacher positions herself, as well as those around her, will not only contribute to limited existing knowledge about the impact of the pandemic on care work responsibilities of female teachers but also draw attention to the micro-details of the identities that the participant claims throughout the narratives (Bucholtz & Hall, 2005), instead of a singular, monolithic understanding of it.

Going forward, the paper has a specific structure. I start with highlighting the key theoretical and methodological aspects linked to scholarship centered around care work and women in the so called “Global South,” followed by an elaboration of the salient features of “positioning” theory and “decolonizing” feminist research. After that, I discuss the method used for data collection and analysis, followed by a positioning analysis of

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<sup>1</sup> The term “Global South” includes the regions of Latin America, Asia, Africa, and Oceania. It is usually used to denote regions outside Europe and North America that are politically and culturally marginalized (Dados & Connell, 2012, p.12)

five extracts from the interview. The study ends by arguing for the potential of positioning theory as an analytical tool towards decolonizing feminist research in the field of CIE.

### **Women and Care work within feminist scholarship: An Essentializing Account**

Care work refers to the non-market, unpaid activities carried out by individuals inside the households, and includes both direct care, such as feeding a baby, and indirect care work, such as cooking, cleaning, or fetching water (Jorge, 2019). According to a 2018 report by the International Labor Organization (ILO), globally women spend more time in unpaid care work than men, with the difference being the highest in Asia and the Arab states (Addati et al., 2018, p.58). This unpaid care work is closely linked to the sustainment of the formal, paid economy, as well as the household economy. Another 2019 report by ILO (Charmes, 2019) draws attention to how the provision of unpaid care work by women plays a key role in determining whether they can access employment, their progress within the job-market, as well as the quality of jobs they perform.

The gendered nature of care work and its impact on women's professional work has been a topic of interest to feminist scholars as early as the 1980s. However, the bulk of empirical literature on the intersection between care work and professional work in the 1980s focused on women's experiences within the Global North (Bundlender, 2007), with research on the Global South conducted mostly at the theoretical and/or conceptual level. For instance, Moser's (1993) seminal book *Gender Planning and Development: Theory, Practice, and Training*, which draws attention to the "triple burden" (p.27) of performing the productive, reproductive, and community roles faced by women in most low-income households within the Global South, is based on secondary literature and the author's personal experiences from working in the field of international development and does not include the voices of women that it claims to speak for.

While the Global North continues to be the center of production, as well as the subject of a majority of the empirical literature on the gendered nature of care work, there have been several studies on care work in the past two decades that focus on countries within the Global South such as India, Indonesia, Nepal, and Tanzania. Most of these studies are quantitative in nature, where authors synthesize data from existing national level time-use surveys to quantify the gendered nature of care work performed by women and provide recommendations based on the findings (Hirway & Jose, 2011; Floro and Komatsu, 2011; Fontana & Natalie, 2008). While providing valuable data about the division of labor between genders in terms of the relative hours spent on activities, these studies are limited in their ability to provide insight into the lived experiences of the female participants.

Even in the case of qualitative and/or mixed-methods studies, researchers tend to present an essentializing picture of women as oppressed victims of patriarchy who lack agency, instead of a localized and in-depth engagement with how they understand, experience, and negotiate with the essentially gendered phenomenon of care work. For instance, Chopra and Zambelli (2017) make use of quantitative surveys and semi-structured interviews along with a visual participatory toolkit with participants across sixteen research sites in four countries (India, Nepal, Rwanda, and Tanzania) to conclude that the "drudgery" of care work leads to the "depletion" of women's time and energy across all the four research sites (p. 42). Along similar lines, Marphatia & Mousie (2013) employ results from time-use diaries by men ( $n=48$ ) & women ( $n=106$ ) in Nepal along with discussions to draw attention to how societal norms push women into the "marginalized"

(p. 589) position of caregivers and nurturers, which in turn has a negative impact on their professional and personal lives.

The point being made is not that care work is not oppressive, but rather that the methodologies typically used to study women's experiences with care work provide limited engagement with how the participants experience and navigate the phenomenon. Instead, they tend to *colonize*—defined as the discursive tendency within Anglocentric/Eurocentric feminist research to present women from the Global South as a “singular, monolithic subject” (Mohanty, 1988, p. 66)—the complexities and conflicts that characterize the lives of these women.

In the specific context of female school teachers, studies in the past have drawn attention to the negative impact of care work responsibilities at home on teachers' professional lives (Erdamar & Demirel, 2014; Noor & Zainuddin, 2011). Of equal significance is the phenomenon of the extension of their care work responsibilities from the familial to the professional spaces due to the gendered expectation to perform proxy roles of “mothers” inside the classroom (Cortina and San, 2006). The pandemic not only revealed the extent to which the daily functioning of families, communities, and the formal economy is dependent on women's invisible work (Policy Brief: The Impact of COVID-19, 2020, p. 6), but also the central role played by female school teachers in providing a quality learning atmosphere to students (Falk et al., 2019).

While there has been renewed interest in exploring the intersections between women's unpaid care work responsibilities at home and professional lives during COVID-19, the majority of the existing empirical literature is based on real-time surveys conducted during the pandemic in the Global North (Andrew et al., 2020; Sevilla & Smith, 2020; Xue & Munn, 2021). Additionally, limited research exists about female school teachers' experiences with care work at home and online teaching. This study seeks to fill these two research gaps by generating new knowledge about the lived experiences of a female school teacher with increased care work responsibilities during COVID-19 in India. Through the demonstration of the use of positioning theory, the study also provides a methodological roadmap for feminist researchers seeking to explore the dynamic, contextual, and multifaceted nature of the identities of their participants.

### **Positioning Theory as a Tool for Decolonizing Feminist Research**

In her seminal article *Under Western Eyes: Feminist Scholarship and Colonial Discourses* (1988), Mohanty highlights the problematic nature of using the term “women” as a stable category of analysis within feminist analysis, and the subsequent tendency to conflate the category of “women” with subordination without paying attention to the socio-economic context within which they are located. With specific reference to care work, she draws attention to how concepts like sexual division of labor, family, marriage, etc. are used within feminist discourse without considering the local, cultural, and historical contexts in which they take place. Spivak (1988) echoes similar sentiments when she draws attention to how, when it came to the prevalent discourses surrounding the Hindu Indian practice of *Sati*<sup>2</sup> at the time, one never got to encounter the real-life testimonies of women's voiced consciousness. Their voices were either appropriated by the British colonizers to justify colonization, something that Spivak (1988) refers to as an instance of “White men

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<sup>2</sup> *Sati* or *Suttee* was a historical Hindu practice followed in India where the widow sacrificed herself by sitting on top of her deceased husband's funeral pyre. It was banned by the British colonial administration in 1829.

saving brown women from brown men" (p. 269), or by Indian nativists who essentially claim that "the woman actually wanted to die" (p. 297).

Decolonizing feminist research refers to a process whereby the researcher contextualizes, problematizes, and negotiates with the prevalent colonial discourses (master narratives) that position third-world women via the use of essentializing analytical categories, such as victims, dependents, and rebel. It involves going beyond analytical binaries that continue to predominate western feminist thought, to instead account for the "uncertainties, ambiguities, and contradictions" (Manning, 2021, p. 2) that define the existence of women from the Global South. And such a pursuit calls for new and nuanced research methodologies that enable the feminist researcher to accurately (re)present the voices of the female participants in the study without imposing subjective forms of consciousness on them.

Positioning theory's focus on conceptualizing identity as discursively constructed (Norton & Toohey, 2011) and an emphasis on how individuals engage in the social positioning of self (reflexive positioning) and one another (interactional positioning) within interactions, can be seen as providing a useful tool towards the purpose of decolonizing feminist research. Davies and Harré (1990) define positioning as the "discursive process whereby selves are located in conversations as observable and subjectively coherent participants in jointly produced storylines" (p. 48). Positioning can be seen as a metaphor through which a researcher can "compendiously collect" (Van Langenhove & Harré, 1999, p. 17) key information about a person's moral and personal attributes. Instead of essentializing accounts of identities as a zero-sum game via the use of macro-categories, positioning theory focuses on the "emergent" and "dynamic" nature of identities which are relationally constructed within an interaction. It rejects the notion of identity as a set of static and immutable traits inherent within the individual self (Nikolaou & Sclafani, 2018), and instead investigates the "micro details" of the participants' identity as it is shaped from moment to moment within interaction (Bucholtz & Hall, 2005, p. 591). Subsequently, self and identity within positioning theory are under constant revision and interactively renegotiated throughout the discursive interaction (Bamberg, 2004a)

Positioning theory can thus be seen as providing a de-colonial lens to understand a female school teacher's experience with care work during COVID-19 via a focus on how she positions herself, and those around her, linguistically throughout her narratives. In other words, the focus is on understanding the subject positions that she claims for herself throughout the discursive interaction, instead of the subject positions bestowed on her by the researcher and/or the society. As Burr (1995, p. 141) points out:

Discourses provide us with conceptual repertoires with which we can represent ourselves and others. They provide us with ways of describing a person... Each discourse provides a limited number of slots for people... These are the subject positions that are available for people to occupy when they draw on this discourse.

A subject position is created when people use language to negotiate positions for themselves (Davies & Harré, 1990), either from the available conceptual repertoires or invent new ones. Subsequently, participants can be seen as both positioned by existing discourses, as well as creators of new discourses throughout the interaction. This positioning occurs in reference to relevant ideological and cultural factors in addition to social and power hierarchies (Beeching et al., 2018). Positioning theory thus provides the feminist researcher with an analytical toolkit to make sense of how individuals (especially

from marginalized communities) position themselves in reference to the master narratives that define them through macro-categories such as victims, rebels, oppressed, passive, etc.

## Data and Analysis

### Data Collection

A specific form of narrative inquiry called *episodic narrative interviews*, which includes features from narrative inquiry, semi-structured interview, and episodic interviews (Mueller, 2019), was used to elicit “bounded stories” (p. 2) from a female school teacher about her experience with care work during COVID-19 in India. Unlike the typical question response mode within other types of qualitative interviews, narratives prioritize the storyteller’s perspective instead of the interviewers (Anderson & Kirkpatrick, 2016, p. 632). They are thus particularly suited for an explorative research study (Fraser, 2004) such as this one, which seeks to analyze a relatively under-explored research area to produce new ideas and hypotheses (Swedberg, 2020, p. 18). The episodic narrative interview lasted for an hour and a half via Zoom, and the audio recording was saved with the participants’ permission. Within episodic interviews, the researcher requests that the informants share small stories that are targeted and focused in nature, which helps mitigate the “anything goes” (Mueller, 2019, p. 2) approach standard within narrative research (For the interview protocol, see Appendix-I on p. 34).

The participant was recruited via purposive sampling, with the delimiting criteria being that she be a) female b) school teacher c) married with children, and d) her school transitioned to online teaching during the pandemic. The literature review revealed that once children are born, the amount of care work done by women increases substantially, leading to what Addati et al. (2018) refer to as the “motherhood employment penalty” (p. 38). Due to the limited scope of the study and the desire to focus on an information-rich case, a married female school teacher whose baby was born during the pandemic was selected for the study. While the interview was conducted in English, there were some instances of code-switching between English and Hindi by the participant. The teacher’s responses could be categorized into three broad categories of data types:

1. Big Stories: “A coherent temporal progression of events... A plotline that encompasses a beginning, a middle, and an end, conveys a particular perspective and is designed for a particular audience who apprehend and shape its meaning” (Ochs and Caps, 2001).
2. Small Stories: “An umbrella-term that captures a gamut of under-represented narrative activities, such as tellings of ongoing events, future or hypothetical events, shared (known) events, but also allusions to (previous) tellings, deferrals of tellings, and refusals to tell” (Bamberg, 2004a).
3. Participant’s reflections on aspects such as what being a mother and/or professional means for her.

### Data Analysis

The data analysis was divided into three stages:

**Translation and transcription of interviews.** Firstly, those parts where the participant made use of code-switching in Hindi were translated into English, following which the interview was transcribed by the author. Since the aim of the study was to understand and analyze how the participants position themselves and those around them via linguistic means, “edited” or “clean verbatim” transcription was used. Clean verbatim transcription does not capture

paralinguistic features of talk such as symbols and gestures, which were not needed for a positioning analysis of this narrative.

**Selecting relevant data.** As discussed in the previous section, the data received could be divided into three types: big stories, small stories, and participant reflections and musings on concepts such as caregiving, motherhood, being a female professional, etc. While all three types of data were analyzed, any data that did not deal with participants' experiences with caregiving (before or during the pandemic) was not included for positioning analysis.

**Analysis of selected data using Bamberg's (2004a) "Three-level positioning" framework.** Bamberg's (2004a) three-level positioning was employed to analyze the participants' narrative. Positioning level 1 within the framework addresses the question *Who are the characters and how are they positioned in the story?* The focus in this stage was on a fine-grained linguistic analysis of the means used by the speaker to establish the characters in their story. Positioning level 2 addresses the question *How does the speaker/narrator position himself/herself vis-à-vis his interlocutors?* and focused on the interactive work accomplished between the participants (myself and the teacher) during the interview. It seeks to answer the question of why a story is told at a particular time (Blix et al., 2015, p. 171). Finally, Positioning level 3 focuses on how the informants position themselves vis-à-vis the normative discourses around them (Bamberg, 2004a) and addresses how the episodes and short stories are "situated in relation to the social and cultural processes beyond the immediate telling situation" (Blix et al., 2015, p. 171). This can be seen as the final stage, where the researcher seeks to understand how participants answer the *Who am I?* question throughout the interview (Blix et al., 2015).

#### **Participant: Disha Sahni (Pseudonym)**

Disha Sahni is a thirty-three-year-old female school teacher who gave birth to a baby boy three months after the Indian government imposed a nationwide lockdown on 25 March 2020. At the time of the interview (June 2021), she had been married for three years and lived in a one-bedroom apartment in West Delhi with her husband, who is also a school teacher. She responded to a call I posted on social media soliciting participants for a larger study analyzing female school teachers' experiences with care work, COVID-19, and online teaching in India. She teaches Biology to Grade-X students at a government-aided school in New Delhi, which transitioned to online teaching as soon as the lockdown was announced. The approximate annual income of her family is INR 1,000,00, which can be classified as middle-income as per the *Pew Research Centre* (Kochhar, 2015).<sup>3</sup> Her school charges an average monthly fee of INR 3500 and caters to students from middle-income families.

Disha was on paid maternity leave and resumed teaching online classes in September 2020, three months after her baby was born. Prior to the pandemic, she had a house-help who came to her home twice a day to wash the utensils, clean the home, and do the laundry. However, the lockdown in India led to the mass exodus of migrants working in cities, such as Disha's house-help, to their native villages (Slater & Masih, 2020). In the

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<sup>3</sup> According to the Pew Research Centre, the annual income for a middle-income family of four falls in the range of \$14,600 - \$29, 200 (INR 1,022,000-INR 2,044,000) and the annual income of a low-income family of four falls in the range of \$ 1,920- \$ 14,600, (INR 1,34,00- INR 1,022,000) (Kochhar, 2015).

absence of her house help, Disha had to perform all the domestic chores, while also looking after her newborn and teaching online classes.

### A Three-Level Positioning Analysis

Given below is an extract from a big story that Disha shared, along with its positioning analysis. This extract has been chosen because of the light it sheds on how she positions her husband, immediate family (mother), as well as, extended family (mother-in-law), and friends across her narratives about care work and online teaching. Four additional extracts (Extract-II, III are short stories, IV is a big story & V is a participant reflection) are also referred to when carrying out the positioning analysis of Extract-I to provide additional corroborating evidence.

I=Interviewer

// // - Overlapping talk

D= Disha

\* \*- Translation in English

...= long pause (more than 3 seconds)

#### Extract-I

This question was asked in response to Disha's earlier comments that she found it surprising that her husband regularly helped her with household chores, despite being married for three years.

I- Can you think of any incident when you were surprised (during the pandemic) that your husband did that, you know like just in terms of household responsibilities, can you think of any incident?

D-

1. *Maybe not during the pandemic but like it has been more than three years now...and*
2. *since the beginning he has a habit of doing household chores, and he is very good at*
3. *managing the responsibilities at home...like he is a perfect family man, you can*
4. *say and like before marriage, people used to like tell me... "बेटा अभी तो करते हैं सब*
5. *बोलते हैं, बाद मैं नहीं करते!" \*Child, before marriage, all men say that they will help the*
6. *woman but do not do it later\*. I never used to say anything because, I also...*
7. *was...like in doubt will he be doing it or not because I saw men usually don't do*
8. *before marriage they say, but then at the back of my mind somewhere I felt he had a*
9. *habit because... he had been staying alone like since childhood, he had a habit of*
10. *doing it like cooking, managing, and everything... he had a habit of doing it, so yes,*
11. *after marriage, it was a surprise for me that he is still doing it, In fact, he does it*
12. *better than me.*

I- //Laughs//

D-

13. *I was like, I was the youngest child at home, ok. I have an elder brother, so I was the*
14. *pampered one and my mother... she never forced me to do all this, so...in*
15. *fact I feel that people should have this habit because later on it was difficult for*
16. *me, ok...to manage all the household responsibilities...ok, but I am doing (smiles)... I*
17. *am happy doing it...I love doing it (slight laugh)...I love to keep my home clean and*
18. *everything is in place so I love doing that*

I- //Hmmm//



**Positioning Level I: Who are the characters and how are they positioned in the story?**

Her husband is the central character in the first part of Extract-I (Line1-12), as well as, throughout the interview. In this excerpt, all the other characters can be seen as either evaluating him (people who caution her, Disha herself), or are positioned in opposition to him (other men-Line 7). Through the use of positive qualifiers such as *very good* (Line-2) and *perfect family man* (Line-3), and the admission that she was *surprised* (Line-11) that he continued to do household chores even after marriage, Disha positions him as an unusual/atypical man. While *men usually don't do* (Line-7) housework, he had a *habit* (Line-10) of doing it since a young age and continued to help her throughout the pandemic. In fact, she says, he does it better than her (Line-12). The second prominent character in the story is herself. Through the use of the term *pampered* (Line-14), as well as the claim that unlike all the other men her husband is *better* at household chores, she positions herself as somewhat different than other girls when young, and also from other women when she gets married. The term *pampered* is also culturally loaded, and to Disha, the fact that her mother never *forced* her to do household chores is seen as being pampered. And in saying this, she positions her mother as loving and caring.

The third character in the story, who are referred to throughout the interview, are the *people* (line-4) who caution her about men's lackadaisical attitude towards care work after marriage. The fact that Disha characterizes them as *people* instead of giving them specific names, leads us to believe that there were several such individuals who come to occupy the abstract, faceless, and plural category of people. This faceless collective of *people* resurface throughout her narratives, imparting nuggets of wisdom and unsolicited advice, whether it is about men's attitude towards care work after marriage or how best to perform her role as a mother with perfection. At another point in the interview, when sharing her experiences with taking care of a new born baby during the pandemic, Disha commented:

**Extract-II**

19. People will say, that don't give bottle, it will spoil him, or they will be people (who
20. will say) give bottle! It will spoil him. There are both kinds of people...like you give
21. him bottle he will not be able to go to school and he will stick to you, this and that.
22. Like there were pressures from both sides

Throughout the interview, the abstract category of *people* are positioned as having more wisdom than Disha and playing the role of advisors. By *not saying anything* and having doubts about her husband (Extract-I, line 6), Disha aligns her positionality before marriage with those of the people. Like them, she also did not believe her husband when he said he will help her with domestic chores after marriage. She believed in what she *saw* (Extract-I- line 7), instead of what men *say* (Extract-I line 8) before marriage and in doing so, she positions herself as a *critical observer* rather than a *passive recipient* of the advice given by those around her. However, in Extract-II, these people are seen as a source of stress who put pressure on her from both the sides (which refers to her and her husband's extended family) and offer unsolicited advice on how best to raise a child.

**Positioning Level II: How does the speaker/narrator position himself vis-à-vis their interlocutors?**

Because an episodic narrative interview involves minimal to no interruption by the interviewer, except for providing prompts to help the participants share narratives or posing follow-up questions based on the narratives (Jovchelovitch et al., 2000), the bulk of the discursive interaction involved short and big stories shared by Disha. Nonetheless,

there were two instances where she positioned herself in reference to me. It is important to point out here that like her; I am also a married woman of color from India and have taught across schools in New Delhi for six years before moving to the US to pursue a graduate degree. In both instances, she emphasizes the similarity of our experiences as daughter in-laws, mothers (or potential mothers), and / or wives within the Indian society. Given below is an excerpt where she talks about the challenges she faced in terms of division of household labor with her husband when her mother-in-law came to visit during the pandemic:

**Extract-III**

D-

- 23. *Also, my mother in-law was there in between and then uhh...obviously I cannot ask*
- 24. *my husband to do everything, although he was doing, but then you know how mother-*
- 25. *in-laws are?*

I- //laughs//

- 26. *Yes, I know*

D-//Laughs//

- 27. *So there was an increased pressure on me, although my husband said I am not*
- 28. *pressurizing you for anything, but then ... also there is a guilt. You know...*
- 29. *The guilt is very much there. When, like, if my husband is taking care of the baby all*
- 30. *alone, then it makes me feel guilty. I have to be there with him.*

The extract draws attention to how the shift in kinship structures for women after marriage in India have a negative impact on them because of existing power differentials between the mother and daughter in-law (Gupta & Negi, 2021). However, instead of discussing the specific challenges she faced with her mother-in-law, Disha relies on what she feels is our common experience as daughter in-laws within the Indian society. By stating, "You know how mother in-laws are?" (Extract-III, line 25), she universalizes her challenging experiences with her mother in-law, as well as extenuating her from any potential blame for the challenges she caused. To Disha, her mother in-law is like every other mother in-law in India, including my own.

Elsewhere, as she talked about her desire to look after her newborn son with minimal interference from the extended family, she added "You may also experience later on, you are planning no., to deal with your baby your way." Here, she places emphasis on the similarities of our identity as mothers (or a prospective mother in my case). It is interesting to note that, unlike the previous section where she positions herself and her husband as atypical, in this extract she places emphasis on the universality of her experiences as a daughter in-law and a mother when positioning herself in reference to me.

**Positioning Level III: How does the speaker/narrator position themselves vis-à-vis the normative discourses around them?**

Disha's narrative must be analyzed against the backdrop of the patriarchal and patrilocal society of India where marriage shifts a woman from her natal family to being a part of her husband's household (Gupta & Negi, 2021), and where women continue to shoulder the major burden of household chores (OECD, 2018). It should also be understood against the often essentializing image within western feminist discourse of women from the

Global South as victims of patriarchy in need of saving (Mohanty, 1988; Spivak, 1988). Disha's positioning of the self as *pampered* because she was not *forced* to engage in domestic duties as a child, her husband's positioning as *unusual* since he helps with household chores, and her mother-in-law's positioning as a typical Indian mother-in-law occurs in the specific context of the socio-cultural milieu that she inhabits as a daughter, wife, mother, and a daughter-in-law.

The normative discourse around Disha, as gleaned from what people tell her (Extract-I, Line-4) and official statistics, is that women perform household chores and men do not. And while Disha placed emphasis on her husband's help with domestic chores both before and during the pandemic throughout the interview, she also shared that at the end of the day, she was the one primarily responsible for taking care of the baby.

**Extract-IV**

31. *Of course, my husband was a big support (during online teaching)... Like he would*
32. *feed the baby, get up in the middle of his classes, you know. But still, when you are at*
33. *home your attention is divided, no matter how supportive your husband is... Like*
34. *there was incident when we had a mock exam and I made a slight mistake. I never did*
35. *that before because I cross-check everything. But then while I was conducting the*
36. *exam my baby was in front of me and I had to see him... So, I made a slight*
37. *mistake. I was crying because I never expected it. So yes, because of my household*
38. *responsibilities and with a small baby who has just started walking, crawling, it has*
39. *been difficult (to teach). But what can you do?... Ruchi, see, there are so many types*
40. *of work you do, you can, you know replace them with someone else, there is a*
41. *substitution. But here (looking after an infant), there is no substitution, ultimately it*
42. *will come to you and you have to take care.*

In this extract, Disha sets up a contrast between her past professional self before the pandemic, who never made mistakes and "cross-checks everything" (Line-35), and the present professional self whose "attention is divided" (Line-33) due to her baby. However, as opposed to her professional role as a teacher, where "there is a substitution" (Line-40), Disha positions her role as a mother as being irreplaceable. She views herself as the primary caregiver for the baby, a role that only she can perform in the world. Disha's rhetorical question "What can you do?" (Line-39), when talking about the blurring of her personal and professional responsibilities during the pandemic, serves two purposes. Firstly, it conceptualizes the challenges faced by professional mothers during the pandemic as inevitable because of the "irreplaceable" nature of their roles as mothers. And secondly, it betrays an almost fatalistic acceptance of the phenomenon of increased childcare responsibilities on professional mothers because of a child's increased dependence on them. Disha presents this increased dependence of children on mothers, as compared to fathers, as a universal truth not up for debate. Subsequently, she can be seen positioning herself as somewhat accepting of the normative assumptions surrounding the gendered division of labor among spouses, especially when it comes to childcare.

At the end of the interview, I asked Disha the possible reason for the guilt she faces when her husband takes care of the baby in front of her mother-in-law, to which she replied

**Extract-V**

D-

43. *There could be two reasons, like why I feel guilty if my husband is doing all alone*
44. *and I am not there with him, I think it is more of it is...natural human tendency...it is*

45. *not based on gender...And second thing, uhh, like my mother in law, she...in fact my*  
 46. *mother also, although I may not look at her with that perspective, but they have, like*  
 47. *they are from a different generation and you may not be able to make them*  
 48. *understand all those thing ok, which you from the current generation uhh...are aware*  
 49. *of and understand...right?*

I-

50. *Yaa*

D-

51. *So it is better, what to say...to compromise maybe. To compromise and not going*  
 52. *into that...changing the mindset thing...especially if your husband is supportive!*

Similar to the previous extracts, where Disha characterized the challenging experiences with her mother-in-law (Extract-III) and the increased child care responsibilities during the pandemic (Extract-IV) as a universal phenomenon, she conceptualizes the guilt she faces when her husband looks after their child as a natural human tendency and universal instead of being linked to her gender socialization as a woman. Further, when talking about her mother and mother in-law, she positions them as belonging to a different generation who lack the capacity to understand the perspective of those from the new generation like her. She makes a strategic choice to “compromise” (Line-39) with them instead of trying to change their mindset (Line-40), because of her belief that she will “not be able to make them understand” (Line-48), as well as her husband’s support (Line-52). She can thus be seen as “strategically” positioning herself as accepting of the normative discourses surrounding care-work and professional work to avoid conflict, even if she might not agree with them.

## Discussion

The paper set out to understand how a female school teacher from India positioned herself in her narratives about care work during the pandemic, as well as how her identity as a caregiver was expressed within the narratives. Bamberg draws attention to how, through the choice of discursive devices from existing repertoires, speaking subjects face an *agency dilemma* (2011a), which refers to “the apparent contradiction between the speaker as positioning him-/herself as agent and the societal, socio-cultural constraints seemingly ‘always & already’ at work positioning the subject” (p. 10). At one end of the continuum of this dilemma then, speakers choose discursive markers that tend to position themselves as less influential, powerful, responsible, and blame worthy, and at the other end of the continuum, they position themselves as *agentive self-constructors* through discursive markers that position themselves as strong, in control, and self-determined (Bamberg, 2011b).

When it comes to Disha’s self-positioning within the narratives, the distinction between the two ends of the continuum is constantly obfuscated. When she chooses not to speak up against the *people* who cautioned her about men’s lack of involvement with care work after marriage (Extract-I), or feels stressed out because of their unsolicited advice on how to raise a child (Extract-II), or accepts the gendered differential in child care responsibilities (Extract-III), or talks about not wishing to change her mother-in-law’s mindset (Extract-IV), she can be seen as choosing discursive markers (*not saying anything, feeling pressured, compromising*) that position herself as less influential and powerful.

However, she also positions herself as a critical individual who makes strategic choices that she views as benefitting her, instead of a powerless, less influential figure throughout the narrative. In Extract-I, she *chooses* not to speak out because as a critical observer she agrees with the assessment of those people, in Extract-IV she *chooses* to give importance to her role as a mother over that of a professional since she views the former as irreplaceable, and in Extract-V she *chooses* to compromise with her mother-in-law because of her husband's support, as well as what she sees as the futility of the endeavor. In all the cases, she can be seen as exercising agency, albeit of a somewhat different kind.

Mahmood (2011) draws attention to how the meaning and sense of agency cannot be fixed in advance but instead must be understood and interpreted in reference to the culture and society in which it is exercised. According to her, agentival capacity is exhibited "not only in those acts that resist norms, but also in multiple ways in which one inhabits norms" (Mahmood, 2011, p. 15). She also cautions social science researchers against using discursive markers as a gloss for universally shared assumptions but instead focus on how they are "constitutive of different forms of personhood, knowledge, and experience" (Mahmood, 2011, p. 16). Subsequently, it can be said that despite the use of discursive markers typically associated with being less influential and powerful, Disha positions herself somewhat as an "agentival self-constructor" who is in control of the choices she makes, even when these choices entail an acceptance of the normative discourses around her rather than challenging them.

And when it comes to the expression of her identity as a caregiver within the narrative, two contrary pulls are evident throughout. On the one hand, she talks about her relative inexperience in performing household chores and her partner's proficiency in the same (*In fact he does it better than me*, Extract-I), and on the other hand, she talks about the feeling of *guilt* when her husband takes care of the baby alone, as well as, the feeling that *she has to (always) be there with him (baby)* (Extract-III, Line 30). It would not be incorrect then to distinguish between two microdetails of her identity as a caregiver, i.e, her care work responsibilities as a wife and her caregiving responsibilities as a mother. In the case of the former, she positions herself as inexperienced and reliant on her husband's support, whereas she sees the latter as her prime responsibility. Even though her husband does not *pressurize her for anything* (Extract-III), she views herself as the one in charge of the baby's responsibility (Extract-IV). Further, she believes this feeling is universal for mothers across the globe, instead of being linked to her gender and/or socialization (Extract-IV & V). It can thus be said that while Disha's identity as a caregiver, as expressed by her, is seen as being of central importance when it comes to raising her child during the pandemic, it is not as central to her role as a wife. In the case of the former, it is the locus of her identity while in the latter, she assigns an equal status to her partner as a caregiver and care worker inside the home.

### **Limitations of the Study**

Since the findings of the study are based on the analysis of one female school teacher's experiences with care work during COVID-19, it is not possible to draw generalizations based on the findings. The participant's positioning of the self, and those around her, is linked to her specific circumstance and will be different from the experiences of other female school teachers from India and/or the globe. However, the aim of the study is not generalizability, but instead to demonstrate how positioning theory can be used as an analytical tool for decolonizing feminist research within the field of CIE.

## Conclusion

By rejecting the notion of identity as a set of static and immutable traits inherent within the individual self (Nikolaou & Sclafani, 2018) and placing emphasis on the temporary roles and orientations that participants assign to themselves and others throughout the interaction, the study demonstrates how positioning theory presents a useful analytical lens for feminist researchers within the field of CIE, as well as outside it, to understand the experiences of women with local and culturally contextual phenomena such as care work. The analysis revealed the shifting, often contextual nature of the identities that the participant claimed for herself throughout the narrative such as a pampered daughter, critical observer, adjusting daughter-in-law, guilty mother, strategic choice maker, and so on. Positioning theory thus helped problematize the tendency to essentialize women's experiences and identities by drawing attention to the multiple, sometimes contradictory identities that the participant claimed for herself (and those around her) in her life, a complexity that is often neglected within feminist research because of its messiness and lack of amenability to generalization.

At present, when there is a renewed interest in understanding the gendered impact of COVID-19 on women across the globe, as well as in the context of the continued hegemony of the western scholarly establishment in the production and dissemination of articles on this topic, it becomes important that researchers employ research methodologies that effectively re(present) the voices of their participants. Abu-Lughod, one of the leading feminist scholars in the Middle East, asks in an essay that how might feminist scholars effectively understand and represent women's experiences from other cultures without "misattributing to them forms of consciousness or politics that are not a part of their experience-something like feminist consciousness or feminist politics" (1990, p. 47). One of the ways to achieve this would be through a careful, locally-focused analysis of the discursive markers used by the participants throughout the narrative, along with how these markers express their identities across different contexts. The study demonstrated how such an analysis might look like for one female school teacher via positioning theory, and in doing so, contributes to the continued search for decolonizing research methodologies within feminist research. It has also contributed to positioning theory by drawing attention to its effectiveness as a methodology in (re)presenting voices of women from outside the Global North in a non-essentializing and nuanced manner.

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## **Appendix-I**

## Interview Protocol

### Phase I: Introducing the interview principle

My study deals with how you experienced care work responsibilities at home during the pandemic. During our interview, I will repeatedly ask you to recount situations in which you had to manage care work with online teaching during the pandemic, and how you went about it. As someone who also juggled family and work as a school teachers in India for six years, I am curious about how the pandemic impacted female school teachers in India and hence decided to conduct the study. I am interested in any stories, situations, and/or events that stood out for you.

### Phase II: The Interviewee's concept of the issue, and his/her biography in relation to it

#### *II.i – High Level Overview of the topic*

1. What does being a wife, mother, and /or daughter-in-law mean to you?
2. What do you associate with these terms?
3. What does being a school teacher mean to you?

#### *II.ii – Prompts that help them recall specific episodes in connection with the topic*

1. When you look back and remember life before COVID-19, how did you navigate your personal responsibilities at home and professional obligations throughout your life?
2. Can you recall a specific episode in your life when reconciling care work at home with professional obligations became a matter of concern?

### Phase III: The meaning of the issue for the interviewee's everyday life

1. Could you please recount your day yesterday in terms of managing care-work at home?

### Phase IV: Focusing the central parts of the issue under study

1. Take me back to the day when you first heard about the transition to online teaching and ensuing lockdown. What were your thoughts?
2. If you look back to the pandemic, what has your experience been like with managing care work at home?
3. Could you please recount a situation during the pandemic when you were faced with the task of managing house-hold work along with professional work simultaneously?
4. Were there any instances when you faced challenges when reconciling care work with professional responsibilities during the pandemic? Can you think of a specific episode?
5. What strategies did you make use of during the pandemic to reconcile care work with professional responsibilities when faced with challenges?
6. Could you please recount a situation when you made use of these strategies?

### Phase V: More general, relevant topics

1. In your opinion, what impact has the pandemic had on care work and professional responsibilities of female school teachers?

### Phase VI: Evaluation and Small Talk

1. Thank you very much for your time. Was there anything that you think I should have focussed on and missed?
2. Are there any other specific episodes during the pandemic while managing your personal and professional responsibilities that you might want to share?

# Decolonizing Madrassa Reform in Pakistan

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*Pakistan has been engaged in the project of madrassa reform since the early days of its nationhood. Since gaining independence from Britain in 1947, successive Pakistani governments have introduced a series of reforms aimed at regulating and reforming the madrassa sector, but the repeated failure of these efforts suggests the presence of some systemic barrier to reform. This article looks at the history of the madrassa in South Asia under British rule, and raises the question of how this colonial experience has shaped madrassa reform in post-colonial Pakistan. It highlights three key policy interventions of the British in the education sector, namely the 1835 Minute of Lord Macaulay, the 1854 Educational Despatch of the Court of Directors of the East India Company, and the formal institutionalization of higher education, to show that the cumulative effect of these policies was the creation of an ideological binary which bifurcated the education system. It argues that by institutionalizing a singular conception of education, this colonial legacy has impacted key madrassa reform efforts undertaken by Pakistan in 1962, 1979, and 2001/02. The article concludes with a discussion of the necessity of decolonizing future reform efforts such as the national curriculum reform—the introduction of the Single National Curriculum—that Pakistan is currently embarking upon.*

## Introduction

Depending on whom one asks, a madrassa is either a traditional Islamic educational institution with a venerable history dating all the way back to the dawn of Islam—or a hotbed of terrorist activity. Perhaps it is precisely this polarized conceptualization that has led today to madrassas being firmly embedded within the socio-religious fabric of Pakistani society while having become, at the same time, a politically-contentious entity. To be more precise, it is the issue of madrassa reform that forms the point of contention. Pakistan has been engaged in the project of madrassa reform since the early days of its nationhood. Since gaining independence from Britain in 1947, successive Pakistani governments have introduced a series of reforms aimed at regulating and reforming the madrassa sector, but the repeated failure of these efforts suggests the presence of some systemic barrier to reform.

This article looks at the history of the madrassa in South Asia during British rule and raises the question of how this colonial experience has shaped madrassa reform efforts in post-colonial Pakistan. It focuses on three key policy interventions of the British in the education sector, namely the 1835 Minute of Lord Macaulay, the 1854 Educational Despatch of the Court of Directors of the East India Company, and the formal institutionalization of higher education, to show that the cumulative effect of these policies was the creation of an ideological binary which bifurcated the education system. It argues that by institutionalizing a singular conception of education, this colonial legacy has impacted key madrassa reform efforts undertaken by Pakistan in 1962, 1979, and 2001/02. The article concludes with a discussion of the necessity of decolonizing future reform efforts, such as the national curriculum reform—the introduction of a Single National Curriculum—that Pakistan is currently embarking upon.

### **Background: The Madrassa Sector in Pakistan**

The madrassa sector in Pakistan provides religious education and operates alongside the secular public and private sectors. The repeated failure of government-led reforms to register and regulate madrassas has resulted in the sector existing as a loosely-organized and under-documented network of institutions. Since 1983/84, madrassas have been required to affiliate themselves with one of five governing boards (*wafaq*), which are responsible for designing institutional curricula, conducting examinations, awarding *sanads* (diplomas), and representing the political interests of their madrassas. These boards fall under the purview of the Higher Education Commission (HEC) of Pakistan and are organized along strict denominational lines (Riaz, 2008).

The exact number of madrassas in Pakistan is unknown, in part because many madrassas remain unregistered and operate in an informal capacity. At the time of independence, there were reportedly less than 200 madrassas in the Indian subcontinent. The 2017-2018 Pakistan Education Statistics survey reported a total of 31,115 madrassas operating in the country, with a total enrolment of 4.099 million and employing 0.179 million teachers (NEMIS et al., 2021, p. 41). The growth of the sector can be attributed to factors such as the limitations of the public school system and especially the lack of schools in rural areas, and the influx of Afghan and other refugees into the country who are often excluded from the formal schooling system (Hunter, 2020). Another significant factor is the fact that these institutions provide free education, including boarding and lodging, because of which they have come to be perceived as “essentially schools for the poor” (NEMIS et al., 2021, p. 41). Although research on madrassa enrolment remains scant, recent survey data suggest that apart from a preference for religious education, the primary reason parents enrol their children in madrassas is economic hardship (Salahuddin, 2018, p. 43).

The majority of Pakistani madrassas offer either an eight- or sixteen-year course of study, usually divided into six stages, with some specialized institutions also offering a seventh post-graduate level of study. The medium of instruction in Pakistani madrassas is usually Urdu, with many also using provincial languages such as Sindhi and Pashto, and a special emphasis is placed on Arabic and Persian. The madrassas usually follow a variant of the *Dars-i-Nizami*, an 18<sup>th</sup>-century curriculum featuring predominantly medieval and classic Islamic texts. The *Dars-i-Nizami* offers approximately twenty subjects that fall into two broad categories: the *manqulat* (the transmitted/revealed sciences) or the *maqulat* (the rational sciences). Some madrassas also offer ‘secular’ subjects alongside Islamic education. Appendix 1. outlines the specific stages and curriculum of madrassa education. Madrassa teachers tend to have the *alim* (higher secondary) or *faazil* (Bachelor of Arts) madrassa qualifications but do not have any specialized pedagogical training.

### **A brief history of the key British interventions in the education sector and the madrassa response**

This article will focus on the historical development of the madrassa during the two periods of British rule, from 1767 to 1857 under the dominion of the East India Company, and subsequently under the rule of the British Crown until the partition of the Subcontinent into India and Pakistan in 1947. Prior to the interventions of the British in the Indian education sector, higher education was organized informally, segregated by religious community and language, and in many cases, attached to local religious institutions. Examples of these include madrassas and other traditional South Asian schools such as *pathshalas*.

The British East India Company assumed political power in 1765 but did not directly intervene in the education sector until 1813 with the Charter Act. This lack of involvement was an explicit policy decision intended to reassure the Indians against interference or any conversionist ambitions on the part of the British. As such, the Company “maintained a distance from missionary activism [as well], opposed proselytizing, and restricted missionary activities within Company-controlled territory” (Riaz, 2010, p. 77). The 1813 Charter of the Company, however, marked a reversal of this policy as it not only included the responsibility for the education of its Indian subjects in its stipulations but also introduced the requirement for English to be taught in the Indian system alongside Indigenous languages. The “expectation was that English would coexist with Oriental studies as a means by which moral law could be reinforced” (Riaz, 2010, p. 78). This was the beginning of the civilizing mission of the Company, the impetus for which had come from a 1792 report by Charles Grant, a British politician, which included recommendations for a policy of ‘downward filtration’: through the use of English and the provision of education to local elites, the civilizing message would gradually reach the masses.

The Charles Grant report also formed the basis for the first key education policy of the British East India Company, the 1835 Education Minute of Thomas Macaulay. The approval of the Minute by Governor-General Bentinck took place against the backdrop of a broader ongoing debate in Britain about the value of the Western system of education and the use of the English language compared to that of Indigenous education systems and languages. The Minute effectively decided the debate in favour of the Western system and English, and its adoption resulted in the immediate discontinuation of government support in British South Asia to madrasahs and other traditional institutions and for the publication of books in Sanskrit and Arabic (Macaulay, 1835). Instead, funding was now channeled towards Western academic subjects with English as the medium of instruction. The Minute of 1835 became “a watershed in the history of education in India” (Riaz, 2010, p.78), paving the way for policies such as the replacement, in 1835, of Persian by English as the official language.

The second key piece of legislation was the 1854 Educational Despatch, which was the result of an inquiry into the state of education in India conducted by the British Parliament in 1853 as part of the renewal of the charter of the East India Company. The Despatch found the policy of downward filtration to have achieved only limited success and instead proposed a new scheme for organizing education from the primary all the way to the post-secondary level. It recommended that “the government take responsibility for education at all levels, and proposed a transformation of the indigenous schools into Western-style institutions through grants-in-aid to private schools” (Riaz, 2008, p. 70). In effect, it formalized and Westernized education in India as English-language instruction proliferated, and the structure and organization of institutions changed permanently. Government-sponsored education became secular, with the inclusion of Christian moral texts. The Despatch was described as a “complete scheme of general education for all India” and “the climax in the history of education [in India]” (Qadir, 2013, p. 130).

The Despatch had a particularly significant and marginalizing effect on traditional institutions such as madrasahs. It did not, interestingly, recommend the abolishment of traditional institutions as the Macaulay Minute had done. Rather, it established complementary modern and secular institutions and left it up to the market to determine their prospects (Qadir, 2013). Because the grants-in-aid were provided to institutions that met eligibility requirements such as the adoption of a curriculum focused on mathematics, science, and language, the removal of all reference to ‘religion’ other than as part of a

discrete 'religion' class, and formal teacher training and certification of educators, it altered the structure of grant-accepting madrassas. Teaching, for instance, shifted from being done by respected community figures to formally trained educators.

The Despatch thus institutionalized a 'modern' system of education, which proliferated further after India came under the direct rule of the British Crown three years later in the aftermath of the failed rebellion of 1857. In so doing, it paved the way for the third key intervention: the establishment of Western-style institutions of higher education. In the early nineteenth century, the University of London was founded in England amid a debate about secularism in higher education. In India, the colonial government established three universities at Calcutta, Bombay, and Madras in 1857, based closely on the utilitarian model of the University of London (Qadir, 2013). This intervention, in effect, formalized a secular model of higher education in India, even though these first universities were merely examining bodies and provided very little actual teaching. They "did little to promote analytic capacity or independent thinking and produced...graduates with a half-baked knowledge of English, but sufficiently Westernized to be alienated from their own culture" (Maddison, 1971, p. 40).

These three interventions cumulatively helped shape the nature, scope, and changing role of the madrassas in South Asia as they struggled to survive in the changing socio-political climate and navigate the rise of identity politics within the Indian Muslim community (Riaz, 2010). Until the 1870s, Muslim engagement had remained weak and confined mainly to the three universities at Calcutta, Bombay, and Madras. This soon began to change, however, as Muslims began to establish their own institutions of higher education. In 1866, a group of religious scholars established a madrassa at Deoband, partly as a reaction to the growing interest of Muslims in European education and partly "as a centre of Islamic revival in India in opposition to British imperialism" (Qadir, 2013, p. 132). It rejected Western education and pedagogy and advocated a return to traditional Islamic higher education. At the other end of the spectrum, the Muslim-Anglo Oriental College, inspired by European-style education, was established in 1875 by Sayyid Ahmad Khan with the support of the British Government as a means of encouraging Muslim participation in, and integration into, the colonial project. The Dar' ul Uloom Nadwa, established in 1893 by Allama Shibli Nu'mani, rejected both these extreme views regarding Muslim education and attempted to take a more balanced view. These three influential madrassas, with their respective philosophies of Muslim education, became closely aligned with the spectrum of political positions the Muslim community came to adopt in an increasingly politically-charged colonial environment.

### **The colonial legacy: bifurcation of the education system**

The establishment of these and other madrassas in response to colonial policy interventions and their active involvement in the contemporary political discourse is an example of a tangible result of, and reaction to, imperialism. There are, however, many other less tangible results of colonialism as well. Colonialism is more than just "physical violence...inflicted on colonized peoples" or their "natural wealth...extracted and their colonies locked into a relationship of dependency" (McCowan, 2015, p. 41). The colonized learning "to see themselves through the eyes of the colonizer and speak with the colonizer's voice" with "imposed language and frames of thought" is also colonial violence (McCowan, 2015, p. 41). The British also left behind a colonial legacy in the form of an imposed frame of thought. As scholars such as Qadir (2013) and Riaz (2008; 2010) also argue, perhaps the most significant effect of the British interventions in the Indian



education sector was the creation of an ideological binary that bifurcated the education system.

The Macaulay Minute, the 1854 Despatch, and the establishment of secular universities had the cumulative effect of casting education either as modern/Western/secular/true/useful on the one hand, or backward/Indian/religious/false/useless on the other. As the British policies established and funded a system of education that satisfied the conditions of the modern/Western/secular/true/useful half of the binary, religious and traditional education became increasingly marginalized. The public sector of education became secular, and religious and traditional institutions were pushed into the private sphere. The madrassa, specifically, was increasingly “consigned to provid[ing] religious education as opposed to general education” (Riaz, 2008, p. 71), and many ulema, or Islamic scholars, responded by coming to perceive, and fully embrace, their role to protect the religious sphere from Western intrusion and to transmit and preserve their traditions. This shift in perception was accompanied by a shift towards the ‘revealed sciences’ in the curriculum, away from the ‘rational sciences.’

The most lasting effect of this binary, perhaps, was how the ‘usefulness’ of education came to be understood. The British conception of ‘a useful’ education, which they promoted and financed, was one based on the secular sciences, and which provided an individual with the requisite skills to participate meaningfully in public life and the formal economy. Under this conception, schools were agents of development and modernization, education systems were centralized, secular, and homogenized, and together they were able to achieve the vision of a secular nationhood (Riaz, 2008). All other education systems which did not subscribe to or promote, this singular, hegemonic conception of the ‘use’ of education were perceived as ‘useless.’

### **Madrassa reform in post-colonial Pakistan**

This bifurcation of the education system and the binary dividing secular public and private education on the one hand, from religious, madrassa education on the other, is the colonial legacy inherited by Pakistan. The education system of the nascent Pakistani state bore the signs of this duality that had emerged during colonial rule. The public sector was modeled on the Western, secular model of education, while the “exclusion of madrassas from formal economy and society, a process that started under British rule, continued in the independence period” (Bano, 2012, p. 43). Moreover, “[i]nspired by the economic progress of colonial rulers, the leaders of the newly independent [Pakistan] sought rapid economic prosperity and industrial growth” and to that end, “any platform averse to modern scientific inquiry was considered suspect” (Bano, 2012, p. 45). Thus began the process of madrassa reform, with the government introducing key reforms in 1962, 1979, and 2001. To date, however, this process remains incomplete.

These three reform efforts were complex and multifaceted, with local political factors playing a significant role in shaping their goals and trajectories. For one, these three organized efforts at reforming the madrassa sector were initiated by military leaders, who had a vested political interest in legitimizing their rule. Second, because Pakistan’s *raison d’être* as an independent nation-state is intimately tied to the interpretation of Islam and ‘Muslimness,’ the issue of Islamic education is a deeply political one. These reforms were also contentious because they were not always planned, initiated, and implemented by the government with the involvement and support of the ulema. A comprehensive analysis of these reforms and their effects is beyond the scope of this article. It will thus focus instead on a key theme that is common to all three: curriculum reform.

In 1959, a year after assuming power in a *coup d'état*, General Ayub Khan instigated the process of madrassa reform against a backdrop of intense debate on the role of Islam in politics and governance. The reform had two key goals: (1) bringing madrassas under government control by restricting their sources of funding, and (2) curriculum reform. The first goal was achieved through the nationalization of *awqaf* or Islamic endowments in 1960 and was a success. It had the immediate effect of weakening madrassas, "forc[ing] a change to the ulama's cognitive environment, and pos[ing] a threat to their political vitality," thus creating an enabling environment to enact the second part of the reform, changing their curricula (Riaz, 2008, p. 194).

In 1961, a committee was established to examine the existing curricula used by madrassas and "make recommendations as to how the students of the madrassas could be prepared to meet the demands of employers" (Riaz, 2008, p. 194). It included eleven members, of whom three were affiliated with madrassas, six were from universities, and two were from the government. It included in its purview approximately seven hundred madrassas teaching the Dars-i-Nizami curriculum and was financed by the Asia Foundation, an American non-profit organization (Ali of Swabi, 2012). In 1962, the Report of the committee made a series of recommendations, including the introduction of new subjects such as mathematics, social sciences, and sports, as well as the substitution of unnecessary non-religious subjects with subjects based on undisputed sources of knowledge. It should be noted that the recommendations for reform were limited to the 'non-religious subjects,' although this term itself was a point of contention between the reformers and the clergy.

The specific recommendations of the Report included the extension of the curriculum to fifteen years, including five years of primary education determined by the Ministry of Education and compulsory for all students; the division of the new system into five stages; the use of Arabic and/or English as the medium of instruction at the secondary level and Urdu at the primary level; the introduction of mathematics; the introduction of examinations at the highest level in hadith, astronomy, and Euclidean mathematics; and the removal of logic and philosophy by virtue of being inessential to the study of religion. Additionally, a directorate of religious education was to be established with the mandate to supervise madrassas and in particular, the performance of teachers and students. The Report also called for special six-month training courses for the teachers in the new subjects (Ali of Swabi, 2012). General Ayub Khan's reform agenda was perceived as "an attempt at the 'colonization of Islam'" and unsurprisingly, "the ulema reacted to it" (Rahman, 1999, p. 75). These proposals for curriculum reform were not successful and were rejected by the majority of notable ulema.

The second key set of reforms was initiated by General Zia-ul-Haq, who, like Ayub Khan, came to power in a *coup d'état*, initiated reforms to gain legitimacy, and was responsible for a far-reaching Islamization of Pakistan. In 1978, Zia ordered the Ministry of Religious Affairs to prepare a report on the madrassas in the Sargodha district. This Sargodha Report was a pilot project which paved the way for the Halepota Report and the reforms of 1979 that the latter instigated. The Halepota Report was, in fact, near identical to the Report of 1962 and was produced under the leadership of Dr. A.W.J. Halepota, who was largely responsible for the Report of 1962 as well. Both reforms had the same essential goal: "integrating them [madrassas] with the overall educational system in the country" as "madrassa education was failing to prepare students for the requirements of the modern age and for careers, particularly in the public sector" (Riaz, 2008, p. 199). It found little uniformity in curricula or the system of examination and recommended the integration of the madrassa sector into the mainstream system of education. Unlike the Report of 1962, however, it reportedly did engage the ulema in extensive consultation

prior to making the final recommendations, although there was no ulema representation in the committee leadership. It also offered the madrassas unconditional financial support from the government for operational purposes as well as infrastructural upgrades. As well, the government promised to improve the employment prospects of madrassa graduates, especially in the public sector.

These recommendations included the introduction of new subjects to the Dars-i-Nizami syllabus, such as Urdu, arithmetic, and general science at the primary level; English, general mathematics, and Pakistan Studies at the secondary level; political science, political economy, and English as optional subjects at the baccalaureate and master's level; and comparative religious sciences as a mandatory subject at the master's level. One-third of the curriculum was to be composed of 'modern' subjects. A National Institute of Madrassas was proposed to supervise madrassas, revise and compile the new curriculum, administer standardized exit examinations up to the master's level to allow madrassa students to compete with other students, award diplomas, and promote the interests of the madrassas, their teachers and students. The composition of this institute was to ensure equal representation of all subjects from within the madrassa sector as well as representation of the government. Furthermore, the equivalence of madrassa certifications against the formal education system was proposed from the primary to the master's level (Ali of Swabi, 2012).

This second wave of curriculum reforms also failed to achieve its ends, despite the apparent concessions to madrassas. Although it found initial support, it was soon boycotted by almost all schools of thought within the madrassa sector as an attack on their autonomy (Ali of Swabi, 2012). Some madrassa organizations did adopt certain recommendations in later years to access the promised funding, but observers argue that this was largely a result of a quid pro quo between the sector and the government (Riaz, 2008, p. 200). As Pakistan became a frontline state in the war against the Soviet Union in Afghanistan in the late 1980s, in which the madrassas were actively supported by Pakistani as well as allied governments, the reform impetus was forgotten for almost a decade.

The third key set of reforms came under General Pervez Musharraf, yet another military ruler. These were enacted in three stages, and the circumstances which gave them impetus are strongly suggestive of neocolonialist forces at play. Musharraf came into power in 1999, and in 2001, promulgated the Pakistan Madrassah Education (PME) Board Ordinance. The Ordinance was aimed at integrating madrassas into mainstream education and proposed the establishment of a board to supervise madrassas. As well, it outlined a model curriculum including secular subjects for madrassas to follow and established three 'model' hybrid institutions, which were hoped to set an example of how religious and secular education may be combined in a single institution. These model madrassas offered English, mathematics, computer science, economics, political science, law, and Pakistan Studies in addition to Islamic education.

However, before this Ordinance could be fully implemented, the events of 9/11 took place. In their aftermath, Pakistan was under extreme international pressure from the United States and the European Union to curb militancy associated by some reports with its madrassas. In response, Musharraf introduced the Madrassah Registration Ordinance 2002, with immediate effect. This Ordinance was focused more on madrassa regulation than curriculum reform, requiring all madrassas to register with the Pakistan Madrassah Education Board and provincial boards at the risk of being fined or forcibly shut down. It also restricted funding from foreign sources as well as the admission of foreign students.

As far as curriculum reform was concerned, it promised funding to madrassas offering science, mathematics, English, and Urdu in these subjects.

This Ordinance was much more restrictive and rigid in its proposals than the PME Ordinance 2001, and this was due, in part, to the pressure from the West, and especially the United States, which led to a change in the government's stance on the reforms (International Crisis Group, 2002). The intent of the 2001 reforms was—at least ostensibly—to establish the model madrassas and not impinge on the freedom and autonomy of the sector, with General Musharraf emphatically clarifying that 'We do not aim to bring Madaris under the control of the State'" (Muhammad et al., 2011, p.316). The Ordinance of 2002 attempted to precisely do this.

Both "the United States and the military government of Pervez Musharraf concurred that *madrassahs* in Pakistan were the first and foremost source of terrorism and militancy in Pakistan and beyond, and that these had to be tamed, reformed, or simply uprooted and banned if need be" (Naseem, 2009, p.221). The state of Pakistan's education system, and specifically of the madrassa sector, was identified as "relevant to both immediate and longer-term U.S. interests in South Asia," and the United States Agency for International Development (USAID) implemented a five-year, \$100 million bilateral agreement in 2002 to increase access to quality education in Pakistan (Kronstandt, 2004, p. 1-2). The Western media kept the issue of madrassa regulation very much in the public consciousness. Under continued pressure from the U.S., the "bulk of U.S. aid for educational reform [was] diverted to fighting/reforming/controlling the *madrassahs*" (Naseem, 2009, p.220).

In mid-2002, the Musharraf regime introduced a third stage of reforms, which turned the focus back on curriculum. The five-year plan (2002/3-2007/8) aimed to support 8,000 willing madrassas in the adoption of curriculum changes in the form of the introduction of secular subjects such as English, mathematics, Pakistan Studies/Social Studies and general science at the primary to secondary levels, and English, economics, Pakistan Studies and computer science at the intermediate level. These curriculum changes were intended to integrate the madrassa sector with the formal education system, with the Ministry of Education providing the textual and instructional material and support. To facilitate this, the government offered to provide teacher training, incentives in the form of the cost of equipment such as computers and other infrastructure, and a one-time grant to equip libraries and buildings. Furthermore, it was willing to open the lines of communication with the ulema to facilitate this modernization scheme (Riaz, 2008).

Like its predecessors, these reforms faced a significant backlash. As early as the initiation of the first stage of reform, the ulema formed an association called the Ittehad-e-Tanzimat-ul Madaris-e-Deenia (IITD) to resist any attacks on their autonomy in either the administration of the madrassas or in the determination of the curriculum. Furthermore, international pressure, and especially that from the United States, simply served to add fuel to the fire. The ulema, as well as some sectors of civil society, perceived this as a hegemonic project of the West. In her analysis of the Pakistani madrassa sector, C. Christine Fair (2009) reports the sentiments of various madrassa leaders at the time: "no one has the right to interfere in our institutions," "it is pressure from the U.S. government," "the Pakistani government is not sincere" and that there is "no need to introduce worldly subjects [into the curriculum]" (p. 88). By the end of 2002, only 1,200 madrassas had registered themselves. The majority chose not to accept the curriculum reform or reveal their sources of funding. The nature and scope of the reforms remained divisive, and there was very little progress in the madrassa sector (Riaz, 2008).

**Discussion: why did these reforms fail?**

These reforms failed for many reasons. They failed because of poor implementation. They failed because of the complex political, economic, and cultural forces at play. Most importantly, they failed because of immense pushback and deep suspicion by the madrassas and the ulema. This reaction of the madrassas, and the roots of their resistance to reform, can arguably be traced back to the colonial interventions aimed at reforming the predecessors of these Pakistani madrassas. The bifurcation of the education system that the colonial interventions left behind, and the binary that their policies helped create and which shapes the conception of education to this day in post-colonial Pakistan is one contributing factor to the failure of these madrasa reforms. The binary of painting modern Western secular values as true and useful versus the depiction of Islamic values deemed as backward or false can be distilled down to the basic, underlying question of what is the purpose, and hence 'use,' of education? The British understood the 'use' of education as the preparation of the student to participate and perform well in the public and economic spheres of the colonial regime. In the contemporary era, those who subscribe to this view of the 'use' of education perceive a 'useful' education as one that equips a student for functioning in the modern capitalist economic system, and the subjects that are the most 'useful' are the secular, 'rational' ones such as science and mathematics, and those that teach English, the global lingua franca. As the proponents of neocolonialism and World Culture Theory are likely to argue, this conception of education, reflecting the values of Western liberal capitalism, has, in fact, become the dominant view of education around the world.

In post-colonial states such as Pakistan, this binary has in effect institutionalized a singular, hegemonic ideology of education which has been internalized by the colonized state and its peoples. This ideology frames how they think of education and is reflected in the education priorities of the government and the public system of education. From the outset, the Pakistani state has held madrasa education in disdain and perceived it as inferior; in the country's first election, it designated madrasa graduates as 'illiterate,' thereby barring them from the electoral register (Bano, 2012). In introducing the madrasa reforms of 1962, 1979, and 2001, the Pakistani government thus espoused this view of the 'usefulness' of education, with the result that all three reforms were integrationist in nature, aiming to integrate madrasa education into the mainstream, formal system with the intent to make the former more 'useful' for the needs of the twenty-first century.

The problem, however, was that the madrassas did not espouse this view of the 'usefulness' of education. The pushback and the resistance resulted from a clash of visions about what makes education 'useful.' Madrassas have a very different conception of the use of the education they provide. They perceive their role to be the preservation and transmission of the faith, imparting religious education with the purpose of making their students 'good Muslims'. As such, they argue, their curriculum should be judged according to how well it succeeds in achieving *this*. They have very little interest in preparing their students for the knowledge economy. In this capacity, they reserve for themselves the right to determine what makes a 'good Muslim' and design their curricula accordingly, resisting any impingement on their autonomy.

All three reform efforts can be seen to have this underlying clash of visions. In all three cases, the "goal of these changes...[was] to create equivalence between general education and that offered by the madrassas [and] to introduce non-religious, occasionally described as 'useful' subjects..., thereby rendering the madrasa students more employable in jobs" (Riaz, 2008, p. 191). The reforms of 1962 and 1979 sought to force madrassas to include

secular subjects in their curricula. The reforms of 2001/02 attempted to incentivize the madrassas, but with the same underlying goal.

The madrassas of Pakistan reacted to these reforms by clinging to their traditions just as the madrassa at Deoband had reacted to the colonial attempts at reform by espousing religious revival. They believed that integration into mainstream education would prevent them from imparting religious education and that the primary goal of the government has always been to curtail their autonomy and independence (Hadid & Sattar, 2019). Considering the Musharraf-era reforms, moreover, they argue that “[w]hatever was happening in the beginning of twentieth century at local level under British colonial rule is happening on a global scale under American colonial rule [*sic.*]” (Riaz, 2008, p. 208). The result of this has been the development of deep mutual distrust between the madrassa leadership and the government of Pakistan, with each party wary of the other’s intentions and convinced that they will fail to honour their obligations (Johnson et al., 2006). This trust deficit will need to be overcome for reconciliation and any meaningful reform of the sector to take place.

### **The way forward: decolonizing madrassa reform**

In 2019, the Government of Pakistan’s federal education ministry announced plans for the development of a Single National Curriculum (SNC), which would be implemented across all provinces and territories and in public and private schools, as well as in the madrassas. The impetus behind this curriculum reform was ostensibly the need to “address the inequities in the education system, improve the quality of education, and provide equality of opportunity for all children” (Bari, 2021, p.139). With regard to madrassas, the government’s goal is reportedly to bring “madrassas...within the ambit of formal schooling” so as to “help hundreds of thousands of seminary students get the same education as other students in the country and allow them to appear in board exams” (Hashmi, 2020). The first phase of this curriculum reform was implemented in August 2021, in which the curriculum and textbooks were developed for grades Pre-1 to 5 in all subjects. The second and third phases are expected to be implemented in March 2022 and March 2023, respectively.

The SNC was reportedly developed through extensive consultation with, and the involvement of, a wide range of stakeholders, including representatives from the madrassa sector. In 2020, it was reported in the media that an agreement had been reached between the Ministry of Education and the federation of religious seminaries that will see some 35,000 madrassas adopt the SNC, register, and have their bank accounts opened (Hashmi, 2020). In 2021, emerging reports suggest that the madrassas are backing out of this agreement and that the government is now giving them five to six years to adopt the SNC (The Current, 2021).

It remains to be seen whether the madrassas will concede and adopt the SNC. However, unless Pakistan looks back at its history of madrassa reforms, and indeed, the development of madrassas in the context of its colonial history, and derives lessons from these, these reforms are likely to take the same path as their predecessors. Pakistan needs to decolonize madrassa reform, which will require, first and foremost, a conscious shift in thinking. It will entail becoming aware of how its colonial history has imposed certain hegemonic frames of thought upon its collective psyche, which determine how it perceives education and its ‘usefulness.’ It will have to examine the ideological binary which has bifurcated its education system and historically marginalized its madrassas. By becoming conscious of how the binary continues to shape its framing of questions of

education and its ‘usefulness,’ it will be able to approach reform with a broader focus and a deeper understanding.

The framing of the SNC reforms reflects this binary at play. Prime Minister Imran Khan has called on madrassas to produce “better qualified students”— “engineers and doctors”—and to adopt a core curriculum with subjects like math, English, and science (Hadid & Sattar, 2019). Madrassa leaders, on the other hand, oppose the SNC reforms and continue to hold a different perception of what the goal of education should be (Hadid & Sattar, 2019). In response to criticism that the students at his seminary are learning little besides memorizing the Quran and learning Islamic law, one madrassa principal argued that his students “need little else”: “[t]he seminaries deal with man’s spiritual issues...They bless the communities around them” (Hadid & Sattar, 2019). If there is thus no agreement on what students need and will find ‘useful,’ there can be little agreement on reform.

The shift in thinking is thus necessary for the decolonization of future reform efforts. It is necessary to dispel the perception of madrassas as institutions providing inadequate education or as hotbeds of extremist ideology in dire need of government regulation and reform—a consequence of the ideological binary. This shift will require an understanding of the history of madrassas, and especially how they have evolved in response to external pressures and attacks on their autonomy. The Indigenous models of the madrassa and its traditional socio-political role and function will need to be revisited. For instance, madrassas have always functioned as centers of religious learning, advising individuals on how to be good Muslims and the state on how to develop administrations based on Islamic principles. Moreover, madrassas have traditionally operated in informal settings, where there was “no attendance register, no degree awarding system, and no fixed curriculum” and knowledge was transmitted through the deep and informal bonds of a teacher-student relationship (Bano, 2012, p. 25); this changed only after the establishment of the Deoband madrassa. Historically, there was a fine balance in the curriculum between ‘rational’ knowledge and ‘revealed’ knowledge, as evidenced in the 17<sup>th</sup> century Farangi Mahal madrassa. It was mainly in response to the colonial reforms that madrassas began to phase out the former and began to focus almost exclusively on religious education. This history and traditional model of the madrassa will need to be kept in mind.

Any attempt at reform of the sector also needs to understand that the institution of the madrassa has always had internally inspired reformist movements, and these should be explored to understand how the sector and its representatives themselves understand reform. Indeed, there have been a number of Islamic scholars who have realized the necessity of modernizing the madrassa curriculum. However, how they understand ‘modernization’ is arguably likely to be different from the Western conception of modernization, and it will be worthwhile to examine what entails the former. Similarly, Islamic theology and the writings of classical Islamic philosophers such as al-Farabi, al-Ghazzali, and Ibn-e-Sina, who all emphasized “the intimate relationship between knowledge, theoretical and practical wisdom, logical reasoning, ethics and the aesthetics of learning, loving and caring, and spirituality” (Riaz, 2008, p. 221) may suggest a way of modernizing the religious curriculum which is amenable to Islamic principles.

Armed with this understanding of the history and development of the South Asian madrassa, the concrete steps that a reform-oriented government can take towards decolonization and reconciliation include, first and foremost, engaging with the madrassa leaders—constructively, extensively, and in good faith (Johnson et al., 2006). The goal of the engagement should be consensus building—to understand the perspectives and

priorities of the sector and find common ground. The government should make a genuine effort to understand how the madrassa leadership perceives reform and modernization, for indeed, it is by no means oblivious to the need to do so and is very well aware that the survival of the institution in the twenty-first century depends upon it. Confidence-building measures should be adopted to overcome the immense trust deficit that has developed between the Pakistani government and the madrassa sector over the decades. Madrassa leaders should be full partners in the reform effort and be involved in every step of reform design and implementation.

In the case of a reform such as the Single National Curriculum, the core aim of which is to introduce standards of learning at every grade level, these standards—at least as they will apply to madrassa students—should be developed in full partnership with madrassa leadership. If it is not possible to develop a single set of learning standards that will apply equally well to the public, private, as well as madrassa education sectors, then a set of unique learning standards should be developed for the sector based on best practices from other Muslim countries and education systems (Johnson et al., 2006). Similarly, the textbooks for the sector should be developed in consultation with the madrassa leaders and de-center Western canons of knowledge and the assumptions and narratives of Western modernity. They should aim, instead, to give space to multiple, and especially Islamic, canons of knowledge.

### Conclusion

The experience of colonialism has left an indelible mark on the conception of education in post-colonial Pakistan. It has led to the rise of a single, hegemonic ideology—inherited as a colonial legacy—that understands the primary purpose of education to be the imparting of the skills necessary for meaningful participation in public life and the formal economy. A ‘useful’ education is thus that which, in British colonial times, prepared individuals to participate in the colonial machinery as civil servants, and today, to participate in the global knowledge economy. Under the hegemony of this ideology, all other ‘uses’ of education have been discredited and overlooked, and nowhere is this more visible than in the case of the madrassa sector and the issue of madrassa reform.

The madrassa, holding steadfast to its own purpose of providing religious instruction and spiritual guidance, has always clashed with this dominant ideology. In colonial India, it was considered an opponent to enlightenment, rationalism, and scientism; in post-colonial Pakistan, it is considered an obstacle to progress and development, nation-building, democracy, and since 2001, a ‘security concern’ (Masud, 2021). The Pakistani government has been unsuccessfully attempting to incorporate it into mainstream education for decades through a series of failed reforms.

These reforms have failed because of a clash of underlying ideology—a clash of competing understandings of the purpose education should fulfill. Future reforms, including the implementation of the Single National Curriculum that Pakistan is currently embarking on, are also likely to fail unless steps are taken towards the decolonization of policy and reform agendas, and sincere efforts are made towards reconciliation in order to overcome the deep mistrust that currently exists between the state and the sector. These will require a shift in thinking—an understanding of the ideological binary bifurcating the education system, how it has affected the evolution of the madrassa sector, and how it continues to shape policy and reform agendas. These will also require concrete steps to involve the madrassa sector in full partnership in the development and implementation of any future



reforms so that the sector can modernize in accordance with its own needs and role as a central institution in Islamic societies.

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## Appendix 1

Table 1

*Stages of madrassa education in Pakistan and equivalency with general education*

Level in madrassa system	Duration	Sanad (diploma)	General education grade/certificate	Notes
Ibtidayee (Nazara)	4-5 years	Sahahdatul Tahfeez-ul- Quran	Primary - 5 <sup>th</sup> grade	May be offered by a 'maktab', not a madrassa offering higher stages of education Recitation of Quran; memorization of important verses Memorization of entire Quran
Mutawawassat (Hifz)	3 years	Shahadatul Mutawassat	Middle - 8 <sup>th</sup> grade	Some institutions offer secular subjects such as history and geography; most do not have capacity to teach science Modes of Quranic recitation
Sanawiya Amma (Tazvid, Qeerat)	2 years	Shahadatul Sanawiya ul- Amma	Matric – 10 <sup>th</sup> grade	Qeerat: comprised of 7 standardized modes of recitation. Completion makes one a Qari, a prestigious career option
Sanawiya Khasa (Tahtini)	2 years	Shahadatul Sanawiya Khasa	Intermediate - FA	
Aliya, Mohafequl (Khasa wa Sada)	2 years	Shahadatul Aliya	Bachelor's - BA	
Alamiya, Daura- e-Hadith (Sabia wa Saniya)	2 years	Shahadatul Alamiya	Master's	
Takmeel	1 year	Varies with specialization	Post-M.A.	

**Table 2**  
*Typical curriculum of a Pakistani madrassa*

Year	Content
1	Biography of the Prophet; conjugation-grammar, syntax, Arabic literature, chirography, chant illation
2	Conjugation-grammar; syntax; Arabic literature; jurisprudence; logic; chirography, chant illation
3	Quranic exegesis; jurisprudence; syntax; Arabic literature; hadith; logic; Islamic Brotherhood; chant illation; external study e.g. Indian Islamic movements
4	Quranic exegesis; jurisprudence; principles of jurisprudence; rhetoric; hadith; logic; history; chant illation; modern sciences (sciences of cities of Arabia, geography of Arabian Peninsula and other Islamic countries)
5	Quranic exegesis; jurisprudence; principles of jurisprudence; rhetoric, beliefs, logic; Arabic literature, chant illation, external study (history of Indian kings)
6	Interpretation of the Quran; jurisprudence; principles of interpretation and jurisprudence; Arabic literature; philosophy; chant illation; study of Prophet's traditions
7	Sayings of the Prophet; jurisprudence; belief, responsibility, chant illation; external study (Urdu texts)
8	Ten books by various authors on the sayings of the Prophet

# **What is the political culture for young Brazilians?**

## **The process of political socialization through social networks**

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*In this paper, we sought to analyze if the internet and social networks usage could be impacting the constitution of an assertive political culture among young people in South Brazil. We hypothesize that although these new socialized agents are widespread among the young, apathy and disinterest in politics remain. To test our hypothesis, we analyzed data from a survey conducted with secondary school students from Porto Alegre in 2015 and 2019 for values related to democracy, feelings about politics, responsiveness, and political efficacy. Results confirm that the political culture of the young remains apathetic, but those socialized by new agents seem to be closer to developing an assertive type of political culture.*

*Keywords: Brazil, youth, political culture, political socialization, social networks*

### **Introduction**

The apathy for political affairs among young people is not recent in the Brazilian scenario. Low levels of political interest, participation, and distrust of youth corroborate the establishment of a hostile political culture towards democracy and its institutions, leading the youth to disbelief in politics (Baquero, 2018). The novelty appears with the usage of new information and communication technologies, especially within the internet and social networks, which are becoming a socializing agent of the new generations, aside from family, school, and other media types. In addition, the internet is enabling different forms of interaction and social participation, which allows young people to publicly express their views on politics, creating a new space for free-speech interaction.

This possibility impacts political socialization, which comprehends the process of internalization of norms, traditions, and political values of the society. In this sense, this article proposes the following question: "Is the use of internet and social networks impacting the constitution of a civic political culture of the Brazilian youth?" In this regard, we aim to verify if the appropriation of the internet and social networks by young people impacts their interest, participation, and trust in politics. Our main hypothesis is that, even though it is a new socializing agent, the internet is not corroborating the

internalization of more democratic values, furthermore, maintaining the low level of interest in politics.

According to Dayrell (2003), youth is constituted by a series of experiences lived by individuals in different contexts, from socioeconomic, ethnic, generational, and even geographic contexts, with different ways of interpreting politics and democracy. Especially within the context of social inequality existing in the country, it is clear that there is no homogeneous youth, but rather youth(s) as a plural. In this paper, we explore the youth(s) between 13 and 25 years old attending secondary school in the city of Porto Alegre, south of Brazil.

This paper applies a quantitative protocol through survey data used for descriptive and inferential data analysis to meet its purpose. Data consists of surveys conducted by the Latin America Research Center (NUPESAL / UFRGS)<sup>1</sup> in the scope of the project "Democracy, media, and social capital: A comparative study of the political socialization of young people in southern Brazil", coordinated by Marcello Baquero and Rodrigo González. Surveys were applied in 2015 and 2019, with 690 and 863 individuals, respectively, aged between 13 and 24<sup>2</sup>, attending public and private secondary schools of Porto Alegre, capital of Rio Grande do Sul (Brazil).

The paper is divided into three sections, apart from this introduction and the final remarks. First, we draw a general discussion of political culture, socialization agents, and new media, followed by a contextualization of the Brazilian youth and its relation to politics. Secondly, we bring data from our research to address the political culture of youngsters from Porto Alegre/RS to test our hypothesis. To do so, we divide the respondents according to the institutions they appointed as the most relevant source of political knowledge, considering three main groups: traditional agents (family, church, friends, and school), mass media (printed journals, television, and radio) and new media (internet and social media). Thirdly, we cross those groups with variables of political culture to verify if youth socialized by new agents are more assertive by validating if there is a positive and significant relation between the main agent of socialization and variables of interest in politics, participation, and sense of efficacy in politics. Our final remarks then follow this discussion. Results show that although young people are more socialized by digital agents this does not mean they are more assertive on politics. Thereby we see a decrease in interest in politics and a long-lasting disillusion with the political system in this new generation that continues reproducing a hybrid type of political culture.

### **Political culture, socialization, and internet among young people**

A political system is represented by its culture, which reflects behavioral features and settles a pattern of values (Easton, 1957). Therefore, the importance of citizenship, socialization and political culture have been long-standing principles for understanding youth participation in democratic systems. In this regard, we address political culture as "the specifically political orientations – attitudes toward the political system and its various parts, and attitudes about the role of the self in the system" (Almond & Verba, 1963, p. 12). Scholars that employ this framework pioneered by Almond and Verba (1963) additionally found in their studies that the transmission and reproduction of values and

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<sup>1</sup> The Research Center on Latin America (Nupesal/UFRGS) is allocated in the Graduation Program of Political Sciences from the Federal University of Rio Grande do Sul. It was created by Professor Marcello Baquero in 1985, and since then has been developing a vast experience in quantitative research regarding the youth.

<sup>2</sup> According to the UNESCO theoretical framework (2014), youth is described being aged 15 to 24 years old. We extended this age ratio, to 13-24, as in first year of secondary school most students are aged 13.

beliefs within society occur through the political socialization process (Almond & Verba 1963; Baquero, Baquero, & Morais 2016; Schmidt, 2000).

Academics like Jennings and Niemi (1974) and Sigel (1989) emphasized political socialization as a permanent process through the experiences of individuals through their lives. Political socialization is also part of cognitive development that evolves along stages (Piaget, 1977; Vygotsky, 1991). Besides, it is related to the civic education of a subject, which corresponds to a systematic diffusion of knowledge about the government and public affairs, once there is no mechanical reproduction of democratic attitudes and values (Niemi & Hepburn, 1995; Niemi & Sobieszek, 1977).

Initial studies on socialization focused on the impact of family in the early years as the main influencer on political attitudes (Beck & Jennings, 1975; Hyman, 1959). The second phase of studies considered school as a central player in socialization, especially in the context of inequalities, when families did not meet a minimal socioeconomic and/or cultural background (Banks & Roker, 1994; Beck, 1977; Bernardi & Costa, 2018). Therefore, considering socialization as a dynamic process, it is crucial to understand the role and influence of the different agents. Later, to comprehend electoral behavior, various studies approached the impact of the mass media, and more recently, the effect of the internet and social media on voter's decisions (Freire, Masson, & Turgeon 2018; Miguel & Birololi 2011).

Recent research repositioned the importance of examining the youth as political actors and, in this sense, their socialization process (Baquero et al., 2017). The concept of political socialization displays a valuable role in understanding the connection between youth, politics, and the internet (Morais, 2021). Political participation is likewise influenced by political socialization processes, especially among young people (Fuks, 2011).

Following social changes related to economic and technological transformations, people became more likely to reassemble around identities, which became the only source of social meaning (Castells, 2011). The development and use of new technologies showed great potential for the mobilization of civil society by creating new possibilities for sociability far from the state institutional structures (Gohn, 2016). Given the transformation of participation channels, Norris (1999) studied the possibility that despite decreasing participation, citizens are likely to become more active through new channels as in social networks and internet forums, establishing new patterns of civic engagement. What Norris (1999) calls critical citizens represents individuals more politically engaged and concerned about displaying their discontent with the political system. Moreover, Dalton and Welzel (2014) consider that the dissatisfaction with the functioning of the democratic institutions in effectively promoting well-being generated a more assertive type of citizenship. In this sense, the assertive political culture, or the critical political culture, means a culture of participation and civic engagement while respecting human rights and democratic values. Both concepts were developed because individuals are more willing to engage in politics to contest traditional forms of authority, displaying low levels of confidence in political institutions yet engaging in new forms of political manifestations (Dalton & Welzel, 2014; Newton & Norris, 2000; Norris, 1999).

The concept of new media (or digital media) refers to the internet and social media, markedly to differentiate from analogical forms, usually mentioned as "mass media" (Chandler & Munday 2011; Martino 2014). Albeit mass media operated in a unilateral manner, where individuals were silent receivers of information, the internet, and social media offer a platform where people can actively take part in informing themselves – for better or for worse. Despite all benefits of digitalization, there are still negative impacts



on democracy that pose new challenges, such as disinformation, fake news, and polarization through algorithmic biases.

Hence, the internet and social networks position themselves as new socialization agents of youth, and differently from traditional agents – such as family, school, church, and friends – and the mass media – like print newspapers, television, and radio – they can have an impact of ‘auto socialization’, in the sense that sources of information are conditional to the own agent’s findings.

### **The Brazilian scenario**

The Brazilian democratization in the 1980s, after over 20 years of dictatorship, represented a contradictory process between formal democracy and social inequality (Baquero, 2001). The authoritarian history and a past of political and economic instability have created obstacles to building a democratic culture in the country. Moreover, the lack of a participative civil society and weakened political institutions have contributed to a fragile democracy. A general lack of interest in politics has been observed, along with low levels of political participation and trust in the institutions, leading to apathy, individualism, personalism, patrimonialism, and even corruption (Baquero, 2008). Therefore, we observe what Baquero called a hybrid political culture, where there is a predominance of authoritarian behavior and values combined with a positive perception of democracy as an ideal, but not as a social practice, which is associated with a context of inertial democracy that has been long reproduced since the re-democratization (Baquero, 2018).

Acknowledging contemporary politics in Brazil, we feature the same patterns reproduced repeatedly. In June of 2013, protests arose all over Brazil, having as the main characteristics a spread distrust in political institutions, and general dissatisfaction with outcomes from the political system such as poor public policies and corruption (Filgueiras, 2018). Demonstrations were characterized by the strong participation of young people. It was initially a plural movement, organized mainly by social media, drawing the debut of Brazilian online activism. However, its ideological orientation gradually shifted, being identified as ambiguous mobilizations (Secco, 2013; Avritzer, 2016; Pinheiro-Machado, 2019). A diffusion of anti-politics visions was strengthened in the following years within a strongly polarized society (Baquero, Ranincheski, & Castro, 2018).

Therefore, demonstrations arose once more in 2014, related to the World Cup and aggravated within the electoral scenario, and in 2015 and 2016, with movements pro and anti-impeachment of the former president Dilma Rousseff. There was a strong political activation online by new groups created in 2013, yet displaying a different profile, no party identification, and an appeal to moral values (Gohn, 2016). By 2018, the far right-wing candidate, Jair Bolsonaro, benefited from Brazilian crises and cleavages to win the elections, representing an illiberal backlash (Hunt & Power, 2019). The political scenario in Brazil by 2015, when the survey was conducted, was marked by the recent presidential election held in October of 2014, massive corruption scandals and accusations, the impeachment process of President Dilma Rousseff, and for demonstrations pro and against the government and the impeachment (Bernardi, 2017). By 2019, the far-right-wing president, Jair Bolsonaro, was in his first year of mandate, after the controversial 2018 elections marked by spread misinformation on the internet and social media, especially by WhatsApp’s messaging app.

Avritzer (2018) observes a pendular democracy in Brazil that moves from democratic waves to antidemocratic reversals. The 2018 elections displayed a rise in online campaigns, and Bolsonaro adopted aggressive campaigns on social media and WhatsApp. While "Temer and Bolsonaro's government are part of a shift toward reducing the democratic governance spaces", anti-authoritarian movements also emerged or were strengthened during the 2018 elections, which showed that digital politics can likewise impact democratic developments (Lima, 2020).

While in 2015, 97.1% of Brazilian homes had a television, in 2019, this percentage remained stable at 96.4%. On the other hand, internet access increased from 57.8% in 2015 to 82.7% in 2019. The landscape of internet access in the country was shaped mainly by the growing importance of mobile phones used for this purpose. By 2019, 94% of Brazilian residences had a mobile phone – with 81% of people aged over ten years old owning a mobile for personal use –, it was the main device for internet access, used for this purpose by 98.6% of Brazilians, compared to 46.2% of access via computers. By 2015, 17.3% only accessed the internet via mobile, while in 2019, this rate represented 58%. In 2019, the age group that used the internet the most was between 20 and 24 years old (92.7%). This percentage accounts for 90.2% for those aged between 14 and 19 years old, and 77.7% for those aged between 10 and 13 years old (IBGE, 2015 and 2019).

The construction of youth citizenship is a strategic issue in the Brazilian democracy, notably due to the difficulties imposed on the socialization of these young people by the structural framework of the Brazilian political culture. The Research Center on Latin America (NUPESAL), coordinated by Professor Marcello Baquero, has periodically analyzed data on political socialization in Southern Brazil, seeking to assess what young people think in a longitudinal perspective; this has generated a series of relevant articles, dissertations, and theses (Silveira, 2005; Zorzi, 2016; Bernardi, 2017; Moraes, 2021; Bernardi & Costa, 2018).

For instance, Baquero and Baquero (2014) found that in Porto Alegre, 55% of young people in 2001, 58% in 2004, and 67% in 2010 did not usually participate in any political activity. Bernardi (2017), when comparing the process of political socialization during high school, in the years 2002 and 2015 in Porto Alegre, found a discrepancy in civic competence and the valorization of democratic attitudes among young people from public and private schools – while private students were much more interested and engaged in politics, students from public schools lacked interest in civic engagement. The data showed a significant disparity in the quality of the educational system between public and private schools, which is reproduced in the index of civic competence (Hoskins, Villalba, Van Nijlen, & Barber, 2008). Within this framework, we can argue the existence of multiple types of young people. According to Dayrell (2003), youth consist of a series of experiences lived by individuals in different contexts (i.e., socioeconomic, ethnic, generational, and even geographic) whom each has different ways of interpreting politics and democracy.

### **Data Analysis: the youth of Porto Alegre/RS**

In this section, we analyze data regarding youth people from Porto Alegre. As appointed in the relevant literature regarding important socialization agents (Beck, 1977), the data shows how each agent performed in 2015 and 2019. To observe the impact of social media and the internet on the political culture of the youth, we divided our respondents according to their answers regarding which institution was the most relevant when forming an opinion on political issues. To analyze the impact of new media, we then applied the following clusterization:

**Table 1**

*Importance of socialization agents when forming an opinion on political issues (%)<sup>3</sup>*

Agent	2015	2019	Agent	2015	2019
Family	38.6	35.7	Traditional agents	63.3	58.9
School	17.7	16.0			
Church	3.4	3.3			
Friends	3.6	3.8			
Printed Journals	7.8	7.5	Mass Media	15.3	16.2
Television	7.3	8.4			
Radio	0.2	0.4	New Media	21.4	24.9
Internet	18.8	22.0			
Social media	2.6	2.9			
Total	100	100	Total	100	100

N 2015 = 586, N 2019 = 837

Source: Nuposal, 2015, 2019

When observing Table 1 above, we first pointed it out that the traditional agents were the only group that lost influence, with a 4.4% decrease, as a primary source of socialization for young people when forming their opinions on political issues. Meanwhile, the mass media showed an increase of 0.9% and the new media of 3.5%. For the mass media, we notice a shift where television became the most influential, overtaking printed journals. Regarding the margin of error in both years of only 0.05, we can observe that even with the slight changes during the period, the media, and in particular the new media, occupied some space that used to be from traditional agents.

Table 2 shows the access to the internet in each group in 2019, as for 2015 we did not have this data available. As we can see, internet access is widely distributed between all groups, but higher among youth socialized by new media.

**Table 2**

*Access to the internet in 2019 (%)*

	At home	At School	Mobile Access
Traditional Agents	96.0	57.8	89.3
Mass Media	94.6	57.9	83.5
New Media	97.5	67.0	94.1

N 2015 = 586, N 2019 = 837

Source: Nuposal, 2019

<sup>3</sup> When forming an opinion on political matters, which of the institutions below do you consider most important?

**Digital socialized agents and political culture: are they more assertive?**

Regardless of each agent's power in the socialization process, it is essential to account for the young as an individual with its interests developed in an environment of multiple influences. Therefore, the variable of interest in politics is highly insightful, as it indicates how much the young person is willing to engage in politics.

**Table 3**

*Socialization agents x Interest in politics (%)*

	Year	Much	Little	Nothing	Total
Traditional agents	2015	23.5	59.0	17.5	100
	2019	18.6	55.9	25.6	100
Mass Media	2015	13.6	68.2	18.2	100
	2019	19.5	62.4	18.0	100
New Media	2015	37.5	53.3	9.2	100
	2019	30.7	55.6	13.7	100

N 2015 = 569.  $p = .000$ , N 2019 = 837.  $p = .000$

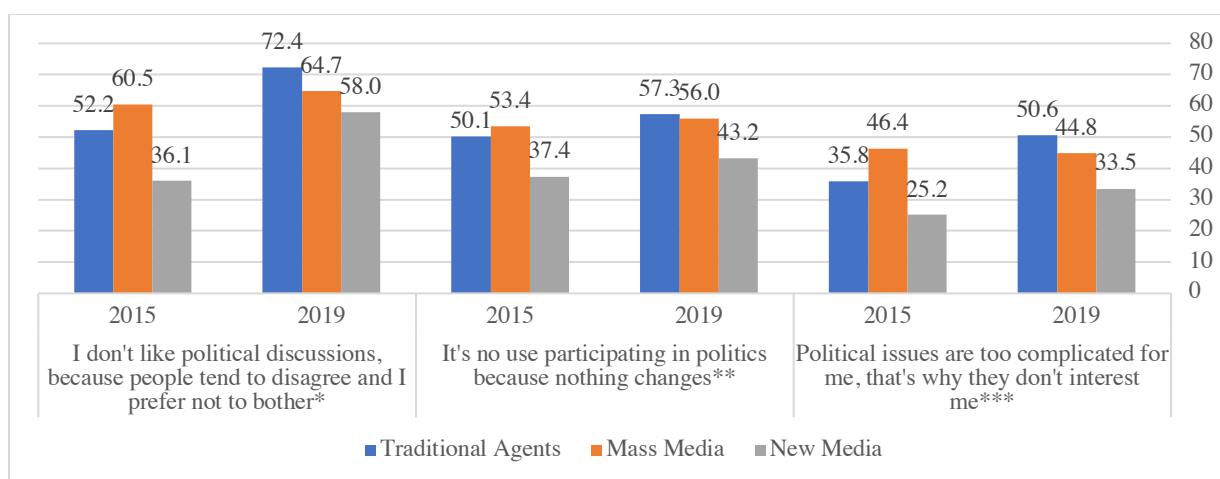
Source: Nupesal, 2015, 2019

According to Table 3 above, we conclude, first, those young people in their majority display little interest in politics. However, this group has reduced among those socialized by traditional agents and mass media. Nonetheless, the ones socialized primarily by traditional agents overall lost interest in politics, given the almost 5% decrease in those very interested and over 8% increase in those not interested at all. Meanwhile, those socialized by mass media mostly shifted from little interest to much interest, once the latter has increased almost 6%. On the other hand, there was a decrease in interest in politics for those socialized by social media – a loss of almost 7% among the very interested ones and a rise of 4.5% among those not interested. Still, they are the group presenting the youngest people with high interest in politics and least young people not interested at all in the matter, both in 2015 and 2019.

Interest in politics is also important concerning political efficacy, as individuals will only be interested in subjects they can somehow understand or relate to. A sense of efficacy and system responsiveness is one of the main aspects that encourage people in general (especially youths) to engage in politics. Since the 1950s in political science and the mid-1970s in psychology, many scholars have been debating the concept of political efficacy (Campbell, Gurin, & Miller, 1954; Almond & Verba, 1963; Easton & Dennis, 1967; Beaumont, 2010; Verba, Scholzman, & Brady, 1995). Although they disagree in some aspects regarding definitions or measurement methods, most authors corroborate that strong political efficacy is positive for democracy and correlates with political participation (Easton & Dennis, 1967; Niemi, Craig, & Mattei, 1991; Kahne & Westheimer, 2006).

**Graph 1**

**Internal Political Efficacy: Accordance to the affirmations regarding itself in the political system (%)**



N 2015 = 569.  $p^* = .001$ ;  $p^{**} = .027$ ;  $p^{***} = .006$

N 2019 = 837.  $p^* = .001$ ;  $p^{**} = .003$ ;  $p^{***} = .000$

Source: Nupesal, 2015, 2019.

First, we observe a general trend of decline in political efficacy when comparing 2015 and 2019, which is more prominent for the first affirmation: “I don’t like political discussions because people tend to disagree, and I prefer not to bother”. The graph above displays the proportion of young people that agreed or partly agreed with the proposed statements. While by 2015, those socialized by mass media were the ones who liked the least political discussions, by 2019, those socialized by traditional agents took the lead. However, the percentage for mass media only increased less than 4% in the period, although traditional agents and new media raised over 20% each.

Regarding new media, this change is likely to be related to the growing hostility in the online environment in the country. According to data from the V-Dem Institute, between the period, the use of hate speech by political parties went from periodically to exceptionally often, and the use of false information from rare occasions to extremely often. Moreover, the country presented serious polarization in both years, with an even higher level in 2019 (V-Dem, 2021). Concerning traditional agents, we highlight a trend present in the 2014 elections, and strengthened by 2018, of fights between family and friends due to political discussions regarding shocking points of view, which was likewise present in the online environment, as the example of WhatsApp groups (Ortega, 2018).

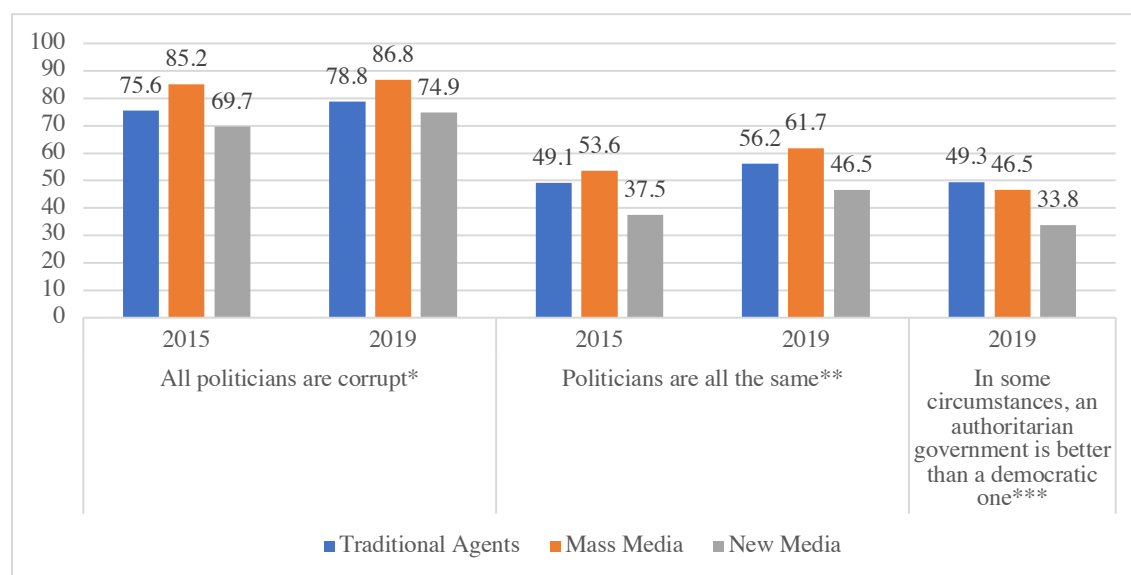
Considering the second affirmation, “It’s no use participating in politics because nothing changes”. First, we observe that young people socialized by new media are the most participative ones, once the majority disagreed with the affirmation in both years, especially in 2015. All groups presented a growing skeptical view about participating in politics, yet by 2019 the ones socialized by traditional agents and media had the most similar opinions about the matter.

Finally, regarding the last affirmation, “Political issues are too complicated for me, that’s why they don’t interest me”, first, we observe a trend, among young people primarily socialized by traditional agents and by new media, of reducing understanding about politics, being this gap between the period higher for the former. On the other hand, those

socialized by mass media remained more stable, with a slight increase in their understanding of politics. Nevertheless, those socialized by new media are the ones that disagree the most that politics are too complicated.

## Graph 2

*External Political Efficacy: Accordance to the affirmations regarding the political system (%)*



N 2015 = 569.  $p^* = .034$ ;  $p^{**} = .040$

N 2019 = 837.  $p^* = .034$ ;  $p^{**} = .040$ ;  $p^{***} = .001$

Source: Nuposal, 2015 and 2019.

Graph 2 displays the visions of young people about the political system. First, we see that young people, in general, perceive corruption as widespread among politics, led by those primarily socialized by mass media, both in 2015 and 2019. The second affirmation about politicians being all the same displays lower agreement but the same trends as analyzed before, both of a growing perception and those socialized by mass media presenting higher agreement with it.

In 2014, corruption was among the main topics on social media, reflected both by the campaign that moderated the public opinion and the internet regarding the political system and the media cover of news about corruption, mostly selectively processing the information on corruption associated with the Workers' Party (PT) (Avritzer, 2016). This rhetoric persisted the following years, especially used by the conservatives to criminalize the left-wing and create a selective outrage. Therefore, corruption appears as the core topic of disregard about the political system, with Operation Car Wash connected to the perception of the political class as corrupt (Gallego, 2019). In the 2018 elections, Jair Bolsonaro employed the anti-corruption movement as one of his campaign lines (Maitino, 2018). According to Costa (2018), the perception of corruption in Brazil accentuates the lack of support for the political system and weakens democratic attitudes.

Finally, the third affirmation ("In some circumstances, an authoritarian government is better than a democratic one") was only available in the 2019 database. It was added to the analysis, given its relevance. By that, we conclude that those socialized primarily by

new media present the most democratic views instead of those socialized by traditional agents.

**Table 4**  
*Socialization agents x Participation in protests (%)*

	Year	Participate	Have participated before	Don't participate	Total
Traditional agents	2015	8.8	33.3	57.8	100
	2019	11.7	21.7	66.6	100
Mass Media	2015	19.5	30.5	50.0	100
	2019	14.1	28.9	57.0	100
New Media	2015	17.9	32.5	49.6	100
	2019	17.6	28.8	53.7	100

N 2015 = 544, N 2019 = 828.  $p$  2015 = .02,  $p$  2019 = .01

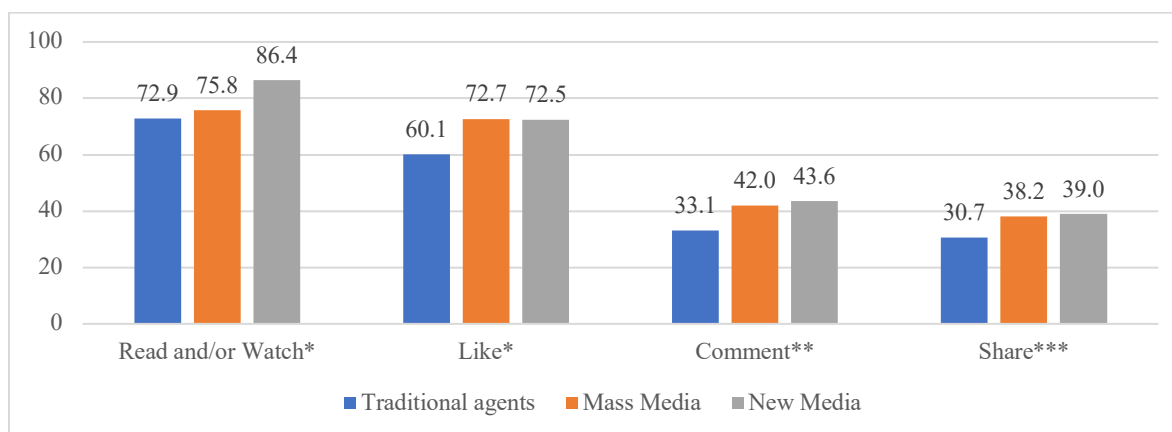
Source: Nuposal 2015, 2019

When analyzing the participation of young people in protests, according to Table 4 we first observe that most of them do not participate. Those socialized primarily by mass media were the ones who participated the most in protests in 2015, followed by new media, which overtook the lead in 2019. Considering 2015, those socialized by mass and new media participated more than double those socialized by traditional agents. However, in 2019, while those who participated remained stable among those socialized by new media, this rate decreased for mass media and increased for traditional agents. Taking into consideration those who answered they had participated before (participate occasionally), we have a few observations: 1) for traditional agents, some have started participating more, but the majority completely stopped participating in protests; 2) for mass media, all of them stopped participating; 3) for new media, most of them stopped participating.

Costa (2019) observed that, by 2017, Brazil developed critical citizens, more politically engaged in demonstrating their dissatisfactions towards the political system, being the media a core actor to mobilize people by criticizing the system. However, they were not mobilized and engaged based on democratic and civic values. Both the traditional media and the internet influence the participation of Brazilians in protests, along with elements such as perception of corruption and the existence of anti-PT sentiment.

**Graph 4**

*On social media, what do you usually do when your friends post about political issues (2019) (%)*



N 2019 = 818.  $p^* = .001$ ,  $p^{**} = .015$ ,  $p^{***} = .05$

Source: Nuposal, 2019

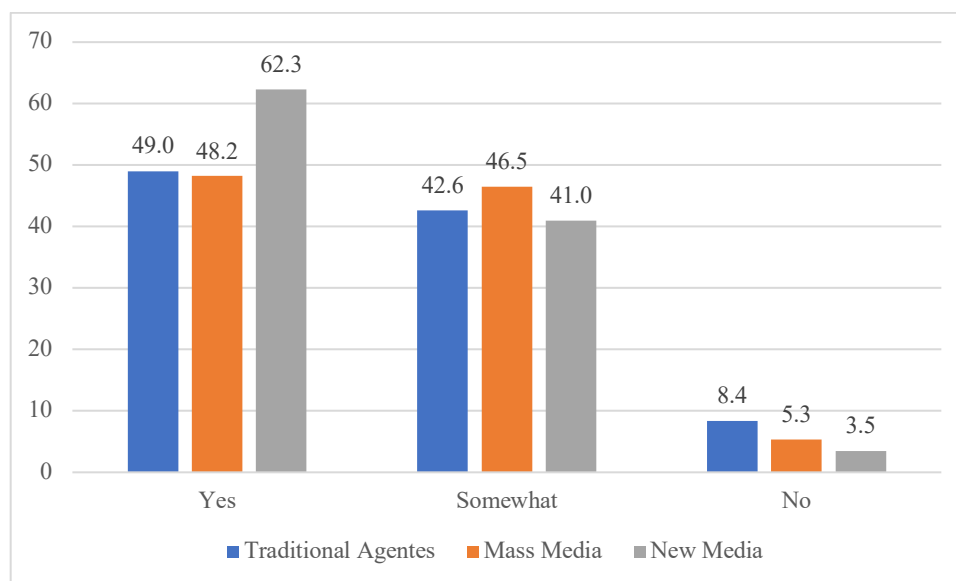
According to the graph above, young people primarily socialized by new media are generally more engaged on social media, but it happens at different levels according to the action. First, it is essential to highlight that they read or watch the video on the post more than the others, which shows that they tend to be more aware of the ongoing debates and trending political issues. On the other hand, the question was related to friends, and given the filter bubble and echo chamber logics of social media, there is a chance that people will be exposed to the same kind of content, according to their network. Likes are the second most popular reaction. However, for this category, those socialized by mass media do it slightly more than those by new media, and both over 10% for those socialized by traditional agents.

For comments, those socialized by new media do it more, but those socialized by mass media have a closer engagement in this type of online activity. As the comments section is too a way of engaging in political discussions and expressing points of view and opinions, only one-third of those socialized by traditional agents engage on it, while those socialized by mass and new media are more eager to do it. Finally, the same trend is observed for sharing and, even if it is the least popular way of engaging in social media, we see that between 30% and 39% share the information, so we notice the information's potential to circulate on social media.



**Graph 5**

*Can social networks be instruments of political participation (2019) (%)*



N 2019 = 768.  $p = .008$

Source: Nupesal, 2019

Finally, according to Graph 5 above, as expected, we observe that those young people primarily socialized by new media believe the most in the role of social media as instruments for political participation. They are more likely to join political discussions on social networks and engage in internet mobilizations. Hence, as observed before, we conclude that those socialized by new media are more participative online and offline. The difference between traditional agents and mass media is slight, both for 'yes' and 'somewhat'. However, it is important to highlight that those socialized by mass media and traditional agents are mainly divided between 'yes' and 'somewhat', mostly understanding social media as instruments of political participation. This observation can be related to several factors, such as the risen access to the internet in the country and the growing role of social media in the 2018 elections since it was the core mechanism for political campaigns.

### Final remarks

One of the reasons to study the relation between new technologies and political culture in Brazil was the broad participation of young people in the protests of June 2013. It triggered several political developments that still reverberate in the country. Furthermore, studies point to the internet as a new socializing agent by which young people are 'auto socializing' and internalizing values (Baquero, Baquero, & Morais, 2017; Morais, 2021). Therefore, in this paper, we sought to analyze if the use of the internet and social networks could be impacting the constitution of an assertive political culture among the young people in the south of Brazil. We hypothesized that although these new socialized agents are widespread among the young, apathy and disinterest in politics remained. To test our hypothesis, we studied data from a survey conducted with secondary school students from Porto Alegre in 2015 and 2019 for values related to democracy, feelings about politics, responsiveness, and political efficacy.

We conclude that even if the importance of the internet and social networks as socializing agents for young people in Porto Alegre has not shown a substantial difference among the studied period, with apathy and disinterest even arising, the role of these agents on the way that young people perceive politics has been reshaped. Even though young people's apathy regarding politics remains and even arose between 2015 and 2019, youngsters socialized by new agents are still more eager to understand politics<sup>4</sup>, feel more interested in the subject<sup>5</sup>, and are more willing to participate in politics<sup>6</sup> than those socialized by other groups.

Overall, young people perceive politicians as corrupt and inefficient and reiterate claims of low effectiveness in the democratic system while claiming that participating in politics does not change reality and that their families have little influence on political decisions. However, these numbers are lower among young people primarily socialized by new media hence we observe that political efficacy and efficiency are the highest among them. This group shows the highest levels of political interest and is also more likely to use social networks to engage in political issues. They read (86.4%), like (72.5%), comment (43.6%) and share (39%) more posts/ videos about politics than the other groups, likely to be more well informed about topics, while they are also the group that agrees the most that social networks can be an instrument of political participation (62.3%). Accordingly, those socialized by new media are the ones that participate the most in political protests (46.3%).

These data point that in Brazil, differently from the claims of Dalton and Welzel (2014), the political culture remains similar to the previous generations. In this context, the internet as a socializing agent corroborates with reinforcing the existing political culture. In this sense, whereas we cannot say the internet and social networks made the political culture of youngsters more assertive, we can observe that those who pose them as the primary agent are closer to an assertive political culture, even though the majority of youngsters continue to show sign of a hybrid political culture. It is also important to underline that this research was conducted prior to the Covid-19 pandemic, so digital media's impact will be even higher if explored nowadays.

Regardless no major shift was revealed by the data. It is important to reaffirm as Agre (1997), that the internet can renew the institutions and clearing society from authoritarian legacy. Nevertheless, citizens must understand the different ways by which the internet can combine with broader social processes. That means significant investment is required on quality education, so young people can learn how to use the internet and social media as a tool for empowerment and knowledge, hence, increasing political engagement.

Once dealing with a brand-new phenomenon implies constant changes, research on this area requires further attention. Still, this paper brings considerable contributions, especially by indicating that even with no significant changes in the short period analyzed, young people socialized by the internet and social media display relevant differences that may represent a potential for democratic stability.

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<sup>4</sup> Only 33.5% of youngsters socialized by new media agreed with the sentence "Political issues are too complicated for me, that why they don't interest me"- being the lowest levels among the analyzed groups in 2019.

<sup>5</sup> 30.7% of youngsters socialized by new media said they feel much interested in politics in 2019 - being the highest levels among the analyzed groups in 2019.

<sup>6</sup> 43.2% of youngsters socialized by new media agreed with the sentence "It's no use participating in politics because nothing ever changes"- being the lowest levels among the analyzed groups in 2019.

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# Opportunities and Challenges: An Examination of Educational Landscape for People with Visual Impairment in China

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*Globally, increasing attention has been paid to disability inclusion in the education sector, from international development to national policymaking. Discussions on inclusive education appear in various conferences, events, policy briefs, academic articles, and global reports. The 2020 Global Education Monitoring Report centralizes inclusion in education, advocates the message of “All Means All”, and highlights inclusive education as its core recommendation (United Nations Educational, Scientific and Cultural Organization, 2020). In the context of increasing global discourse around disability inclusion in education, how does education for people with disabilities fare at local and national levels? Building on the author’s prior research experience and connection to disability rights movement in China, this study sets out to explore the educational landscape for a specific population – Chinese people with visual impairments, and identifies various challenges and opportunities facing education inclusion in greater details.*

## Introduction

Cai lost his sight at age 10 and attended mainstream primary and middle schools in China, with the help of family members and friends who read the school learning materials to him. When Cai applied for accommodation to take the national College Entrance Exam (CEE), his request was denied and Cai was not able to take the Exam (China News Net, 2017). Hence, Cai did not go to a mainstream higher education institution in China as a CEE score is a prerequisite to be admitted.

The Chinese government issued several policies to guarantee the provision of reasonable accommodations for people with disabilities (PWD) during the national CEE in the last decade. This means people with visual impairment (PWVI) like Cai should be provided with reasonable accommodation if they take the CEE. The breakthrough took place in 2014 as a result of years of disability advocacy (Ma & Ni, 2020). Yet, after the policy change, data show that very few Chinese students with visual impairment (especially those with blindness) are accessing mainstream higher education (see Table 1 below).



**Table 1**

*No. of Overall Students Taking CEE VS No. of Students with Visual Impairment Applied for Braille Paper in CEE*

Year	No. of overall students taking CEE	No. of students with visual impairment applied for braille paper in CEE
2014	9.39 million	1
2015	9.42 million	8
2016	9.4 million	5
2017	9.4 million	7
2018	9.75 million	2
2019	10.31 million	10
2020	10.71 million	5
2021	10.78 million	11

Source: Cai, 2017; Chen, 2021

As shown in Table 1, the number of students with visual impairment who have applied for braille exam paper in CEE since the first implementation of reasonable accommodation in 2014 is very minimal, compared to the total number of students taking the CEE in the same year. The fact that virtually no students with visual impairment are taking the CEE begs the question of the reasons for such gaps. Are students with visual impairment (SWVI) or people with visual impairment (PWVI) not interested in advancing in educational ladder like the millions of other students do? What educational opportunities are available for PWVI in China? What is the educational attainment of PWVI relative to individuals with other disabilities and those without disabilities? What are the barriers for PWVI to access education?

Globally, there has been increasing attention on disability studies especially in more industrialized countries. There has also been sizable research on disability and PWD in China. Significant amount of research on disability in China tends to focus on rehabilitation, education, employment, and psychological characteristics of PWD. One study showed that over one-third of all PWVI registered with China Disabled Persons' Federation (CDPF) in central China have clinically significant depressive symptoms (Li, et al, 2013). Among the studies that look at education for PWD, the majority tend to emphasize on education of PWD in separate and often a limited number of special schools, rather than in mainstream schools.

PWVI in China accounted for about 18% to 20% of the world population with visual impairment (Han, 2017). Their illiteracy rate (78.87%) is not only much higher than that of people without disabilities (4.08%), but also higher than that of people with other types of disabilities (illiteracy rates for people with hearing and speech disability: 69.65%; people with psychiatric disability: 46.28%; people with intellectual disability: 56.25%) (First National Survey of PWD, 1987)<sup>1</sup>.

<sup>1</sup> The Survey on PWD conducted in 2006 has not provided disaggregated data by disability type therefore an update on illiteracy rate of PWVI in recent years is not currently available.

Triggered by the recent policies and the questions around PWVI, this study examines closely the educational opportunities for people with visual impairment (PWVI) in China, in the hope of providing an overview of the challenges and opportunities PWVI face in their educational pathway. To do so, this paper begins by laying out the guiding conceptual framework. Afterwards, definition and cultural background around disability, methodology of the research, along with historical overview on the education for PWVI in China are provided to better contextualize the study. Following section examines the relevant legislations and policies affecting the education of PWVI. In light of the statistics above that indicate virtually no PWVI apply for college entrance in China, the paper assesses the reasons that could be occurring, noting gaps and barriers to education. Considering significant barriers, the paper concludes with opportunities for improvement.

### **Conceptual Framework: Models of Disability**

Disability is a controversial, evolving, and complex concept. It is socially constructed and interpreted differently by different entities. In the China context, three models of disability are commonly used: the individual model, the medical model, and the charity model of disability. These three models remain dominant in China. They not only largely reflect non-disabled people's understanding of disability, but also affect deeply many PWD's perceptions of themselves. While in some disability advocacy communities, the social model is accepted and promoted.

The individual model sees disability as a personal tragedy (Oliver, 1983, 1995). The model also includes the psychological and medical aspects of disability. The individual model locates the "problem" of disability within the individual, and sees the causes of this problem as stemming from the functional limitation or psychological losses which are assumed to arise from disability. Similarly in the medical model, it is assumed that people's disabilities are caused by their own mental or physical impairments. The focus is on the impairment aspect and doctors should be trained to cure such impairments or to alleviate their impacts. PWD are viewed as victims of a disease, a problem, and a permanent impairment. As a result, they are in need of treatment to be changed or improved so as to be "normal" (Rieser & Mason, 1990). The individual and medical model of disability put more emphasis and responsibility on PWD instead of being concerned with whether the State and society is being inclusive to its diverse population. Lastly, the social model of disability sees disability as a social construct and lays emphasis on the social environment. Compared to the functional impairment within the individual caused by physical, mental, or sensory impairment, the social model emphasizes the loss or limited opportunities of PWD to participate in the daily life of the community equally with others due to physical, social or environmental barriers (Yeo & Moore, 2003). To address disability, social action aimed at integrating people with disabilities into society and modifying the environment to support their full participation in all aspects of social life is required (Emmett & Alant, 2006; WHO, 2001).

### **Definition and Cultural Background of Disability**

The Article 2 of Law of the People's Republic of China on Protection of Disabled Persons (LDPD, 1990) defines disabled person/person with disability (DP/PWD, will be used interchangeably in this paper) as "one who suffers from loss or abnormality of a certain organ or function, psychologically or physiologically, or in anatomical structure and who has lost wholly or in part the ability to perform an activity in a normal way" (LDPD, 1990).

Six categories of disability are recognized legally in LDPD: visual, hearing, speech, physical or intellectual disabilities, mental retardation, multiple disabilities or other disabilities. Further, visual impairment (VI)<sup>2</sup> is defined as:

The impairment of both eyes or the loss of field vision in both eyes due to various reasons. The impairment cannot be fully recovered or corrected through medication, surgery or other treatments. As a consequence, the person with VI is limited in conducting work, study or other activities (China Disabled Persons' Federation, 2006).

The legal definition of disability shows a strong influence from the medical model (Zhang, 2006) and has been used for over three decades. According to the definition, about 82.96 million people in China had a disability, accounting for 6.34% of the total population (1.3 billion). Among the 82.96 million PWD, about 14.86% of them reported to have VI, which was about 12.63 million. Among PWVI, 89.7% are of low vision (11.33 million) and 11.8% are with blindness (1.5 million). The number of children with VI of compulsory education age (6-14) was estimated to be 130,000, accounting for 2% of the 2.4 million school age children (Second National Survey of PWD, 2006).

Disability is defined differently in different country contexts. Definitions and percentages of PWD have a significant impact on national policies and supporting programs or services around disability (Mitra, 2006). Consequently, it is not surprising that different countries exhibit different statistics on the number of PWD and disability rates (see Table 2). Currently, developed countries exhibit an overall higher rate of disability prevalence compared to that of developing countries. For example, the United States has a broader definition for PWD and include more categories of disability. The Americans with Disabilities Act (ADA, 1990) defines PWD as someone who has "a physical or mental impairment that substantially limits one or more major life activities; has a record of such an impairment; or is regarded as having such an impairment" (ADA, 1990, Sec. 12102). Data from the Census Bureau indicated that 56.7 million people in the US had a disability in 2010, accounting for 19 % of the total population. While a recent study indicated an even higher disability rate - 26.8% of noninstitutionalized US adults aged 18 years or older reported to have one or more disabilities (Varadaraj et al., 2021). Both rates (19% or 26.8%) are higher than the percentage of PWD in China. The Individuals with Disabilities Education Act (IDEA) in the U.S. listed 13 categories of disabilities (2004). Notably, the inclusion of Specific Learning Disabilities (SLD) in the US likely explains the higher percentage of students with disabilities compared with that of in China where SLD is not legally recognized. About 2.4 million students in American public schools are identified with SLD, accounting for 42% of all students with disabilities (Cortiella & Horowitz, 2014; Kritzer, 2012).

The higher percentage along with a broader definition and more categories of disability in the US, may help contribute to a greater acceptance and awareness on PWD compared with that of China, where stigma and stereotype around disability affect PWD negatively (Deng & Guo, 2007). When PWD are enrolled in schools, they are not challenged or supported with the adequate resources for them to succeed (Deng & Guo, 2007). In regards to PWVI, the lack of awareness also prevents some parents from sending their children with VI (low vision) to special education schools for the fear of being labeled as having a disability (Xu & Ji, 2010). The majority of the PWD in China, about 75%, are concentrated in rural areas, according to the 2006 national survey on PWD.

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<sup>2</sup> VI includes both blindness and low vision in China.

PWD in China traditionally are referred to as “残废”(Can Fei), a derogatory term which translates to “disabled and useless.” Today, the more commonly-used characters for disability are “残疾”(Can Ji). These two characters are hieroglyphics and reveal interesting etymological stories. For the first character “残”(Can), the left part of the character means “death,” and the right part means “two spears or daggers.” This reveals the original meaning of “残”(Can), which depicts a picture of people fighting with weapons to kill each other. Today “残”(Can) usually means injured, incomplete, and evil in different phrases. The second character “疾”(Ji) originally depicted a picture of a person getting hit by an arrow, therefore became injured and fell ill. Today, “疾”(Ji) usually means illness. As a result, disabled person (DP) or persons with disabilities (PWD) in Chinese are written as “残疾人”(Can Ji Ren), meaning injured, incomplete, and ill people. On the contrary, non-disabled people in Chinese are referred to as “健全人”(Jian Quan Ren), literally translating to “healthy and wholesome people.” The Chinese languages for disability and non-disability reflect a strong influence from the medical and individual model.

Table 2

*Differences Between the Definitions of PWD and PWVI in the US and China*

	China (2006)	United States (2010)
<b>Definition of PWD</b>	One who suffers from loss or abnormality of a certain organ or function, psychologically or physiologically, or in anatomical structure and who has lost wholly or in part the ability to perform an activity in a normal way	Someone who has a physical or mental impairment that substantially limits one or more major life activities; has a record of such an impairment; or is regarded as having such an impairment.
<b>No. of PWD</b>	82.96 million	56.7 million
<b>Percentage of PWD</b>	6.34%	19%
<b>No. of PWVI</b>	12.63 million (89% low vision & 11% blindness)	8.1 million (Census, 2010; 24.6% blindness) 7.6 million (ACS, 2016; National Federation of the Blind)
<b>Percentage of PWVI among PWD</b>	14.86%	14%
<b>Percentage of PWVI among Total Population</b>	0.94%	2%
<b>Total Population</b>	1.3 billion	309 million
<b>Illiteracy Rate Among PWD</b>	43.29% (age 15 or above)	N/A

### Methodology

This study is built on the author’s prior research on disability and education in China, as well as the author’s connection and involvement in the country’s disability rights

movement. Using key words including “visual impairment,” “education,” “special education in China,” and “blind education” to search relevant sources, the study reviews secondary data and grey literature on education for people with disabilities, and more specifically, education for people with visual impairments in China. The majority of the reviewed studies are from the recent four decades, during which access to education of all levels started to expand for individuals with disabilities in China. The study draws from existing data and research in either Chinese or English language, with the majority of the sources documented in Chinese. News, reports, surveys, and basic statistics on people with disabilities from different sources (e.g. China Disabled Person’s Federation, Ministry of Education) are also reviewed for this research. Lastly, the study also reviews documents from a long-established Disabled Person’s Organization (DPO) named One Plus One Group on Disability in China as well as an informal report produced by a male disability activist with blindness. These documents are shared by the DPO and by the activist himself respectively.

### **Historical Context on Education for PWVI**

This section lays out the development of educational opportunities for PWVI, including provisions at different educational levels. The idea to support and help PWD could be traced back as early as 2000 years ago in ancient China. However, public education service for PWVI or PWD was virtually non-existent until recent decades (Deng & Manset, 2000). There were not much expectations placed on the education of PWD in general. The history of educating PWVI started from a few initial special schools established by foreign missionaries in the late 19th century to the emergences of special schools built by Chinese people in the early 20th century (Deng et al., 2001; Ni, 2014). The first School for the Blind in China was established in Beijing in 1874 by William Hill Murray, a missionary from the United Kingdom. For a very long time between the late 19<sup>th</sup> century and mid 20<sup>th</sup> century, the only chance for PWVI to get an education was through limited number of separate Special Schools for the Blind (Wan, 2015).

Before the establishment of the new regime under the Communist Party in 1949, there were only 42 Special Schools nationwide with some 2000 students with various disabilities enrolled. These schools were mostly charity-based while education for PWD was far from being accepted as either commonplace or crucial (Mazurek, 1994). The following three decades after 1949 did not witness any significant improvement in educating PWVI or other PWD, due to political instability and economic adversity. In 1953, there were only about 1,300 SWVI enrolled in 13 Special Schools for the Blind and 9 Special Schools for the Blind and Deaf. In 1990, these numbers increased to 2,600 SWVI enrolled in 25 total Special Schools for the Blind and 77 Special Schools for the Blind and Deaf. It was estimated that about 90% of the children with disabilities (about 130,000 children with VI of school age) did not attend school in the early 1990s (Deng & Manset, 2000; Liu, 1997; Guo et al., 1993). Though the adoption of opening-up reform policies in the late 1970s and the implementation of the compulsory education law in the mid-1980s provided some impetus for the development of education for PWD including PWVI (Deng & Manset, 2000).

The key educational development for PWVI occurred in the late 1980s when Learning in Regular Classroom (LRC) movement started (Zhao, 1993). The LRC movement greatly enhanced the enrollment of school-aged PWVI in schools, as it allowed students with disabilities (SWD) to enroll in mainstream schools as their peers without disabilities. One specific project within the LRC movement was the “Gold-Key Education Plan for Students with Visual Impairments,” (Xia, 2011) which played a significant role in improving the

education access for PWVI and raising awareness for mainstream education for PWD. It was estimated that about 7,535 SWVI (almost triple the number since 1990) were enrolled in various schools in 1996. About half of these students were in mainstream schools. In terms of education levels, about 80% of the enrolled SWVI were concentrated in the primary school level and 20% in the junior high school level. There was a lack of senior high school for the blind prior to the 1990s. In fact, the first senior high school for blind students was not established until 1993 in Qingdao, Shandong Province (Wan, 2015). Starting in 1987, a special higher education institution was established, recruiting SWVI along with other students with disabilities specifically. Mainstream higher education institutions only occasionally offer admissions to SWD and SWVI.

Since the mid-1980s, three options in the basic education level are available for PWVI: Special Education Schools for the Blind; Special Classes Attached to Primary Schools and Junior High Schools; and learning in mainstream Primary Schools and Junior High Schools as followers<sup>3</sup>. In other words, educational provisions for PWVI are categorized into two tracks: Special Education School/Classes and Learning in Regular Classrooms as Followers. Similarly, PWVI have the option of going to mainstream higher education institutions or special higher education institutions (HEI) at the postsecondary education level. In addition, PWVI have the option of getting higher education via online open universities (Lai & Lin, 2018), although there is a lack of data on the number of PWVI enrolled in this type of higher education.

### **Legislation Outlining Education for PWVI**

Four main legislations guide the education of PWD and PWVI in China: The Constitution (1949); Compulsory Education Law of the People's Republic of China (1986); the Law on the Protection of Disabled Persons (1990); and Regulations on the Education for People with Disabilities (1994, 2011, 2017). PWD and PWVI have the legal rights to access education in China. China also signed and ratified the United Nations Convention on the Rights of Persons with Disabilities (CRPD) in 2007 and 2008 respectively. CRPD specifies that PWD should be guaranteed the right to inclusive education at all levels.

The Constitution states that the State and society should plan for the work, livelihood and education of the blind, deaf-mutes and other handicapped citizens, laying the legal foundation to guarantee PWD to access education. The Compulsory Education Law (1986) mandates that all children are entitled to nine years of free public education, including six years of primary school education and three years of secondary school education. The Compulsory Education Law stipulates that all schools need to accept both students with or without disabilities. However, this Law does not mention education for SWD in any specific details and does not mandate that schools provide accommodations to SWD either (Zhang, 2011). For example, SWVI are usually not provided with braille and/or magnified printed learning materials in mainstream schools. The lack of accommodations in schools is supported by research conducted by Human Rights Watch in 2013.

Another legislation, the Law on the Protection of Disabled Persons (LPDP) reinforces the foundation that PWD enjoy equal educational rights along with other citizens. Article 21 of the LPDP states "the State guarantees the right of disabled persons to equally receive education." It explicitly states the guiding principle for special education in Article 22:

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<sup>3</sup> Learning in regular classroom as followers implies that the final examination grades of the students will not be accounted for in the performance evaluation of the teacher or school.

The principle of combining popularization with upgrading of quality shall be implemented in the education of disabled persons, with emphasis on the former. Compulsory education shall be guaranteed, priority shall be given to developing vocational education, while efforts shall be made to carry out preschool education and gradually develop education at or above the senior high school level.

Again, the LPDP does not mention accommodations for SWD. Rather, SWD must adapt themselves to study in mainstream schools if they choose to enroll in such schools (Zhang, 2011). In addition, there is an apparent emphasis on the compulsory and vocational education in the above-mentioned guiding principle rather than postsecondary education level for PWD in China. SWVI have limited access to mainstream HEIs since there was a lack of policy mandating the provision of accommodations (e.g. braille paper) in the College Entrance Exam, which was not changed until 2014. As a result, there has been a lack of data on the number of SWD in higher education from the annual statistics released by the MoE prior to 2014.

A final important legal piece is the Regulations on the Education for PWD (1994, 2011, 2017). In recent decades, there has been a growing development of awareness and acceptance in the education of PWD (Deng & Manset, 2000; Han, 2017; Cai, 2017). The amendments and updates made to the Regulations partly reflect this increasing awareness and acceptance. The Regulations still adopt the educational guideline from LPDP, with the emphasis on basic education and vocational education for PWD. The Regulations also spell out that local government agencies along with schools should coordinate and accommodate SWD in compulsory education based on local resource availability. However, the Regulations do not specify details on the how and what of providing accommodations. Moreover, the Regulations add that state-administered certification or qualifying exams should provide accommodations to eligible applicants and exam-takers.

For SWVI, the first state policy that has helped them gain access to mainstream schools is the Learning in Regular Classrooms (LRC), as briefly mentioned in the historical context. Some researchers have argued that LRC equates with mainstreaming SWD in education, while others have pointed distinct differences between the two. As Deng (1991, 2000) argued, LRC “provides only the option of general class placement as opposed to a continuum of services. In this way, the approach more closely reflects full inclusion than mainstreaming.” Another summary stated that:

(LRC) does not necessarily reflect allegiance to the concept of Mainstreaming, rather it more accurately reflects a shortage of personnel, limited fiscal resources, and facilities in addition to geographical considerations. In fact, the idea of Mainstreaming is viewed, at least by one Chinese expert, as presently not workable but instead, a desirous goal for the future (Xu et al., 1995, p. 11).

Testimonials collected from SWVI who were enrolled in mainstream schools showed that they were not held accountable for how much they learned in class:

The principal (of the mainstream school) says I can study in the class as a follower. He meant that I just sit in the classroom and study, but my final grades will not be counted in the class performance evaluation. It is up to me whether I learn or not. It does not matter whether I take the exams or not.... Some students complained that why I do not need to do homework while they have to... (Unpublished testimonial of a student with visual impairment, One Plus One Disability Group).

### **Policies on College Entrance and Higher Education of PWVI**

As mentioned above, the Chinese government issued several policy documents in the years 2014, 2015, and 2017. The first document was issued in 2014 about HEIs' admissions. This document specified that PWVI will be provided with braille and /or electronic papers to participate in the College Entrance Exam (MoE, 2014)<sup>4</sup>. The second policy "Regulation on PWD's participation in the College Entrance Exam (CEE)" was issued in 2015 to further delineate the specific categories of accommodations (13 categories; e.g., extended exam time for SWVI and students with other disabling conditions) (Tian & Wei, 2015). The 2015 Regulation was modified in 2017 with more specifications on supporting PWD to take CEE. As a result of the 2014 policy, braille exam papers were provided in the CEE for the first time in China's history. Prior to 2014, the participation of PWVI in CEE was restricted to a limited few who may be fortunate enough to secure accommodations at the mercy of exam administrators from individual provinces. Jin Xi, the first lawyer with blindness in China, acquired an accommodation (having someone read the exam papers to him in the exam) from his province when he took the CEE in 2007 (One Plus One Disability Group)<sup>5</sup>.

PWVI are also able to access a small number of special higher education institutions (HEIs) in China where they would be streamlined to receive training in a limited number of programs that were traditionally deemed appropriate for them. In Cai's case (the blind person mentioned at the beginning of this article), he could not take the CEE due to a lack of accommodations. Cai ended up taking a different exam and was admitted to a special HEI where he studied in a five-year program on massage. After the legal provision of CEE accommodations, 557 students with VI (low vision) applied for magnified exam papers in CEE of 2017 (Cai, 2017).

The CEE accommodations are regarded as a milestone in the provision of higher education for PWD for two reasons. First, a CEE score has been a prerequisite for one to gain admission into mainstream HEIs for several decades. The higher the score in CEE, the higher the chance to secure a spot in postsecondary education. PWD have been largely underrepresented in higher education due to a myriad of reasons, lack of accommodations in CEE being a critical one (Hu & Lin, 2017). Second, gaining access to mainstream HEIs means that PWD including PWVI have a wider variety of programs to choose from, compared to the limited number of programs set up in special HEIs (Li & Ma, 2017; Han, 2017).

Despite the progress, the Chinese Ministry of Education has also set an Advisory Guideline consisting of three major parts that serve to limit PWVI from accessing mainstream higher education since the 1980s. The Guideline went through some revisions in 1993. The majority of the restrictions remained unchanged for PWD to access various programs in higher education (Han, 2017). According to part Three of the Guideline, PWVI are legally advised to not apply for a wide range of programs on the basis of their visual impairments. The range of programs includes the fields of Law, Psychology, Agriculture, Engineering, Biology, among many others. Admission officers from mainstream HEIs could also reject PWVI to a range of academic programs based on the first two parts of the Advisory Guideline (MoE, 2009). The Guideline restricting PWVI's access to higher education programs sends an unwelcoming and non-inclusive message to PWVI in general. This policy also contributes to PWVI's limited participation in the annual CEE as PWVI perceive taking the route of mainstream HEI as restrictive and risky,

<sup>4</sup> This was primarily the result of advocacy efforts from people with visual impairments in China (Han, 2017).

<sup>5</sup> Several years later, Jin Xi's request for reasonable accommodation to take graduate school exam in mainland China was denied. He is currently enrolled in graduate school studies in Taiwan.



while they may have a higher chance of being admitted to special HEIs where traditional programs (e.g., massage) await them.

### **PWVI in Schools**

Given the legislations and policies outlining the educational provisions and support, this section examines the education enrollment and attainment of PWVI in a closer light. By the end of 1987 and early 1988, there were 21 Specials Schools for the Blind while the number of school-age children with VI was about 126,200 nationwide (Stratford & Ng, 2000; First National Survey, 1987). The school enrollment rate for school-age children with blindness was only about 3.75%, meaning that about 2929 out of an estimate of 78,100 children with blindness were enrolled in schools. Other enrolled SWVI (with low vision) were mostly concentrated in mainstream schools. The enrollment rate for SWVI (with low vision) was about 42.85% in 1987 (First National Survey of PWD).

An estimate of 2.46 million school-age children had one or more disabilities based on the Second National Survey of PWD in 2006. Approximately 63.19% of these children were enrolled in either mainstream or special education schools, lower than the enrollment rate for their peers without disabilities, which was about 99%. 5% (about 130,000 in number) of the school-age children with disabilities reported to have a VI, with 35 Special Education Schools for the Blind set up in place nationwide. The total number of enrolled school-age children with VI was reported to be 41,520 including the ones who enrolled in mainstream primary schools (22,207), SWVI who went to Special Education Schools for the Blind (8,177), the ones in special classes attached to primary schools (129), and the ones in junior high schools (11,007) (MoE, 2006). This gave us an estimated enrollment rate of 31.9% for SWVI in compulsory education in 2006, which was still significantly lower than that of children without disabilities. Again, the enrollment rate of all school-age children at the primary education and junior secondary education levels were reported to be 99.27% and 97% respectively (MoE, 2015). Due to the lack of disaggregated data on age groups, it was hard to estimate the enrollment rates at primary and secondary education levels for SWVI. Despite a growing economy and an increasing investment on education, the enrolled number of SWVI did not increase much. Rather, the number peaked in 2011 and later dropped again. Given the estimated number of school-age children with VI being 130,000 in China in 2006, one could reasonably infer that majority of children with VI are excluded from the compulsory education system (primary and junior high schools), let alone to proceed further to postsecondary education levels. Not surprisingly, among PWVI age 6 and above, only 0.2% held postsecondary education degrees, 0.94% had senior high school education, 3.94% had junior high education, and 16.05% had elementary school education (CDPF, 2008; First National Survey of PWD, 1987).

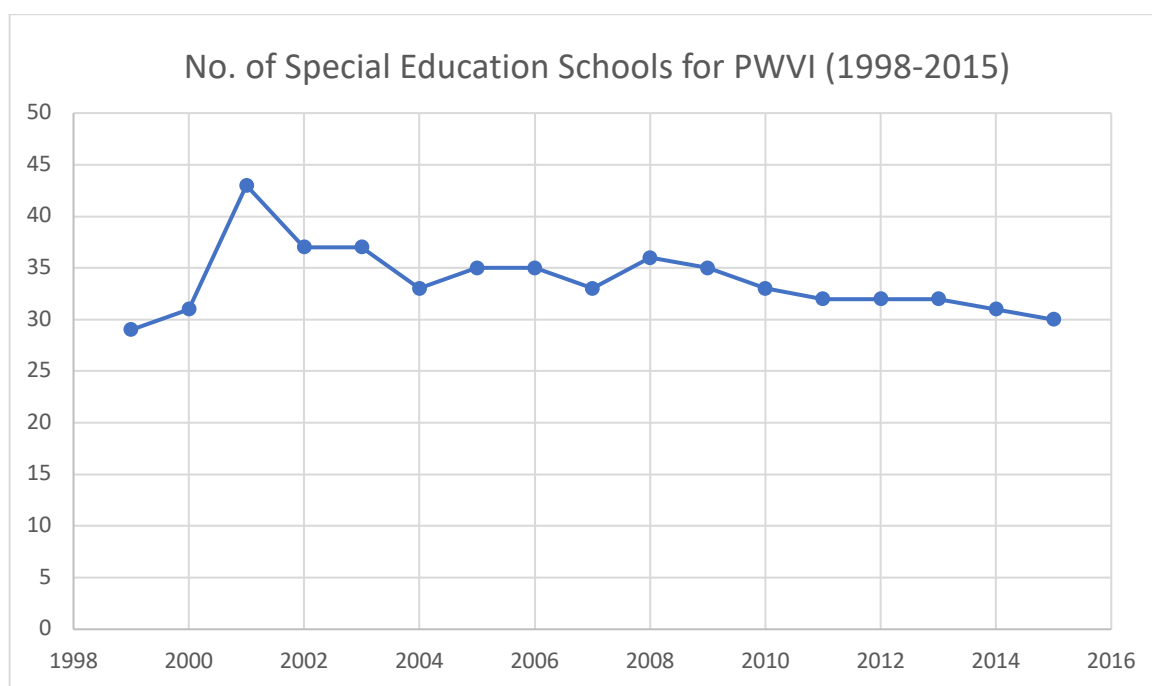
Apart from the picture of lower enrollment rates of SWVI, there has been a lack of studies examining the experiences of SWVI in special education schools and mainstream schools. As mentioned, majority of the SWVI enrolled in mainstream schools are students with low vision. More often, news about SWVI tell the repeated stories that they have been experiencing rejections and exclusions to take part in entrance exams for mainstream HEIs, for graduate schools, and certifying exams (BBC, 2011; China News Net, 2017; Cheng & Lu, 2022). While attending mainstream schools, SWVI have been faced with various barriers such as negative social attitudes and low expectations from people around them, as shown in some SWVI's first-person narratives (One Plus One Disability Group).

### School and Teacher Resources For PWVI

From 1998 to 2015, the number of Special Education Schools for the Blind had not been increasing despite the overall economic development in China (see Chart 1 below). Nationwide, there were 30 Special Education Schools for the Blind in 2015 while there were about 130,000 school-age children with VI in 2006. For these special education schools, the capacity of a large one could accommodate about 200 SWVI in total. Even hypothesizing that all 30 schools were at full capacity, there would be only 6,000 SWVI in schools, accounting for about 4.6% of all school-age children with VI. Another estimate indicated that the current Special Education Schools for the Blind in China could only accommodate about 15% of the educational needs of school-age children with VI, meaning that the majority of children with VI would either seek education from the mainstream schools or simply do not get formal education in schools (Xu & Ji, 2010). Li Jinsheng, a renowned disability advocate with blindness, shared with disability community members an unpublished report he had drafted in 2020, in which he alerted a severe shortage of Schools for the Blind in his home province. Additionally, majority of the existing Special Education Schools for the Blind tend to provide education till the junior high school level. Among them, only eight Special Education Schools for the Blind have the capacity to provide senior high school education (Cai, 2017).

**Chart 1**

*No. of Special Education Schools for PWVI*



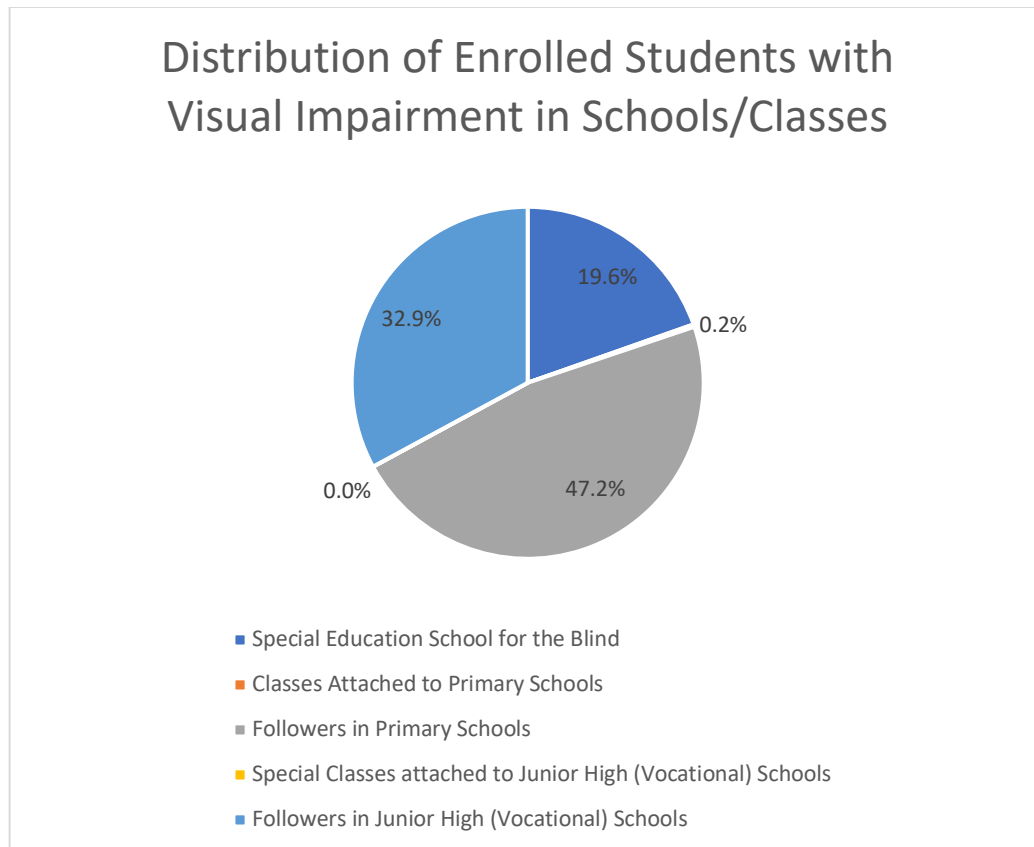
Note. This chart was compiled and created based on the data from Ministry of Education of the People's Republic of China (1998-2015)

The majority (89.7%) of PWVI are of low vision and they are more likely to enroll in mainstream schools. From Chart 2 below, it is estimated that about 80.1% of all enrolled students (41,520 in number) were enrolled in mainstream schools at the compulsory

education level. This percentage is similar to the percentage of PWVI who have low vision. The ones who were enrolled in special classes attached to regular schools were minimal in number. Also, almost all the enrolled PWVI were in classes of primary education level rather than junior high or vocation education. Further research could be done to examine why there is little or zero number of SWVI in the special classes attached to junior high or vocation schools.

**Chart 2**

*Distribution of Enrolled Students with Visual Impairment in Schools/Classes (MoE)*



Note. The Chart was compiled and created based on the data from Ministry of Education of the People's Republic of China.

Like many other countries, China has been in great demand for trained teaching personnel for PWD. It was once estimated that by 2000, 388,000 special education teachers were needed (Deng & Manset, 2000). Yet, even by 2003, the MoE shows there were only 30,349 special education teachers. In other words, there has been a significant shortage of special education teachers since 2000. In average, the number of full-time teachers educating PWD at all educational levels is about 38,827 every year, with 21,661 of them being special education trained teachers (MoE). This means that only about 55% of all full-time teachers for PWD are trained in special education. Moreover, special education training is also recommended for teachers in the mainstream education system, as many SWVI and SWD would enroll there. Without proper training among teachers in mainstream schools, many children with VI or other disabilities enrolled in mainstream schools encounter poor

quality teaching and end up having mental health issues to different extents (Xu & Ji, 2010). Considering 2.46 million school-age children with disability are in need of quality education, there is a huge demand for special education teacher resources and teacher training in China.

### **Findings and Conclusions**

Some preliminary findings emerged from this study. To start, there has been some progress in the education for PWVI. Historical examination shows that education for PWVI in China has an early start but slow development. For PWVI, the places to go for formal education are either limited in the small number of Special Schools for the Blind, or the mainstream schools where they may not be systematically supported. In the past four decades, more PWVI have been enrolled in the basic education level due to policies and initiatives such as Learning in Regular Classroom and “Gold-Key Education Plan for SWVI” (Xia, 2011). And the provision of reasonable accommodations in CEE being a milestone incentivized more PWVI to take up the route for mainstream higher education where more opportunities exist.

Yet, the progress is limited given the size and immensity of the issue in educating PWVI in China. First, PWVI learning in regular classrooms as followers in primary and junior secondary schools could be better supported and held accountable in their academic performances. With little or no support at the early stages of their formal education, it is unlikely that a greater number of PWVI would be eligible applicants of accommodations in the CEE. Accommodations provided to students who persevered to senior secondary education level is only addressing the top of the crust, instead of dealing with the issue from its root. Awareness, accommodations, and support are all needed to better recruit and retain school-age children with various disabilities starting from lower education levels. They are just as important if not more than introducing the policies to allow more PWVI (which we do not see many in recent years) to sit in the annual CEE.

Second, related to the lack of accommodations and support in mainstream schools, PWVI overall have a lower enrollment rate in compulsory education compared to their peers without disabilities. In addition, there is a limited number of Special Education Schools for the Blind, low educational levels provided in the existing Special Education Schools for the Blind, and a lack of teaching personnel resources, especially for those who are professionally trained. As a result of lack of educational provision in both quantity and quality, PWVI in China not only exhibit a much higher illiteracy rate than people without disabilities, but also a higher illiteracy rate than people with other types of disability (except for multiple disabilities). And only a small number of PWVI have the opportunity to access mainstream higher education. Lacking the opportunity to participate in education limits PWVI’s participation, interaction, and integration into the mainstream society at the very beginning. Equally important, the negative social attitudes and stigma towards PWVI in China also need to be addressed. A perspective from the social model of disability needs to be further promoted to understand disability, rather than seeing disability from individual, medical, and charity models.

Lastly, it is important to note a few limitations in this study. To start, there is a lack of detailed data around PWVI. For example, there is a lack of annual data in terms of the number of students with low vision taking part in the CEE. Students with low vision make up majority of SWVI (students with visual impairment) in China. Some data indicates that a larger number of students with low vision, compared with the number of students with blindness, are taking part in the annual CEE, however, the author was not able to locate

reliable and complete annual numbers on students with low vision. Neither is there any gender-disaggregated data among students with visual impairment (both students with blindness and students with low vision). Second, aside from the issues facing PWVI at the basic and secondary education levels as shown in this article, the study does not examine adequately the transition of PWVI to post-secondary education, which is worthy of further research.

Multiple factors are responsible for the lack of educational opportunities and lack of presence for PWVI in the Chinese education system. This is a complex challenge that requires collective efforts from multiple entities. By identifying some of the most significant barriers through research, it is the author's hope that different stakeholders could work persistently and collectively to push toward a more inclusive society for PWVI starting in the realm of education. Education should be at the forefront in pushing for social inclusion rather than a site to reproduce or perpetuate the exclusion and marginalization for an already disadvantaged population. For future research, some directions could be considered based on the findings of this study. Future research could be: 1) qualitative studies researching on experiences of PWVI in different schools (special education and mainstream schools); 2) studies on specific and reasonable accommodations for PWVI at all education levels, including the processes and operations to provide accommodations to PWVI in qualifying exams; 3) studies on the education of girls and women with VI; 4) issues PWVI face in their transition to postsecondary education. These future studies have the potential to better inform and assist multiple stakeholders to include and support PWVI in the Chinese education system.

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# **Educational Values in Complex Systems: An Introduction to the Educational Values Evaluation and Design Framework and a Case Study of Inclusivity in Bhutan**

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*Education systems are complex social systems. This article argues that in order to analyze educational values, attributes, and outcomes within a complex system, greater attention must be paid towards understanding the utility of education and the contexts, discourses, and narratives surrounding the purpose of schooling in society. An Educational Values Evaluation and Design (EVED) Framework is put forward as a means to effectively understand the alignment – or misalignment – of educational values within a complex system. This is particularly relevant for inclusion and diversity in education, in that various elements must be in place beyond legal frameworks promoting access for inclusion to be meaningful and effective. This article presents the case study of Bhutan to support the EVED Framework that was a result of two years of qualitative field research. The results of the research demonstrate that there are multiple and various actors and elements operating with a variety of intentional and unintentional goals within a complex system. Through an exploration of the value of inclusivity in Bhutanese education, we show that an application of the EVED framework can expose the alignments and misalignments that contribute towards the realization of educational values in schools and in society.*

*Keywords: Inclusion, Education, Bhutan, Complex Systems, Values, Utility*

## **Introduction**

Throughout the history of comparative education, there has been an attempt to compare various elements of education systems – e.g., curriculum, pedagogy, policies, national character – often in reference to normative Global North models of education (see Steiner-Khamsi, 2004). The march towards the scientization and quantification of education through comparison has attempted to analyze education systems according to a disaggregation and regression of various widgets, inputs, and outputs (Sobe, 2018). However, we argue that education systems should be viewed as complex systems where all elements of a system affect, and are relational to, each other. Using complexity theory as our theoretical framework, we also put forward an analysis and proactive design tool – the Educational Values Evaluation and Design (EVED) Framework – that compares elements *within* a specific complex education system, rather than *across* countries. That being said, global discourses are a factor in education systems today and they need to be understood across multiple axes (Bartlett & Vavrus, 2017). What we argue is that any comparative study of educational values should look first towards an education system's

*own* goals and objectives – which may certainly be informed through global discourse, borrowing, coercion, and transfer – and analyze these goals within the complex relationality of elements that align or misalign towards reaching these goals. In this article, we will explore educational values in Bhutan as both expressed in policy as well as how these values are interpreted and realized by teachers and students. Specifically, we will focus on ‘inclusion and diversity’ as an educational value.

The idea of inclusion in education is often viewed, or advocated, within a human rights framework centered around the idea of the right to equally access an education (Gordon, 2013). However, what this equal access proposition often means in practice is the perpetuation of ‘special’ and segregated educational provision under new names, and with similar outcomes as before (Schuelka & Carrington, 2022). Rather than a radical reimagining of how education can be transformed to be designed and have purpose for everyone, inclusion and diversity in education has become a case of trying to fit heterogeneous individuals into an existing system that was never meant to be heterogeneous (Varenne & McDermott, 1998). Educational systems continue to hold all students to the same standard, particularly in rigid and centralized national curriculums, which creates a zero-sum outcome of those that ‘can’ and those that ‘cannot’ (Labaree, 2010). By ‘inclusion and diversity’ in education, we mean the value that all children – no matter their abilities, attributes, identities, or characteristics – have a right to an education, as well as a right to a quality education that leads to quality outcomes in society. In other words, inclusion and diversity in education is simply a quality education for *all* (Schuelka et al., 2019). The manifestation of values such as inclusion and diversity in an education system are formed by complex systems with frequent misalignments of actors, priorities, incentives, resources, governance, and other societal elements.

Governments, researchers, development agencies, and non-governmental organizations focused on inclusion and diversity in education have put most of their attention on the barriers to these values and have done well to identify them but have not completely overcome them (Schuelka & Carrington, 2022; UNESCO, 2020). For an educational system to be fully inclusive, there needs to be alignment of the values of inclusion and diversity throughout its multiple elements. In particular, the societal purpose – or *utility* – of formal education needs to inform all other aspects of the educational system in regard to the types of values that the education systems wish to inculcate. The reasons for *why* we go to school and for *what purpose* – for all students – has profound implications for the efficacy of inclusion and diversity in education.

The argument of this article will be supported by recent research on educational values in the country of Bhutan, as well as recent theoretical work on complex education systems and the socio-construction of ‘difference’ in modern schooling (Schuelka, 2018; Schuelka & Engsig, 2020). Featured in this article is a two-year qualitative and empirical study on educational values in Bhutan. This project sought the voices of students and teachers in Bhutan in describing their schooling experiences and the purposes of attending formal school in Bhutanese society. One outcome of this project was the creation of the Educational Values Evaluation and Design (EVED) Framework, based upon an analysis of the data, which will be featured and expanded upon in this article. We view Bhutan as an illustrative case study – one that demonstrates the difficulties in designing and aligning educational values in a complex system – that has much to do with all educational systems around the world. In the next section, we will explore an understanding of education systems as complex systems, and then provide an explanation of the EVED Framework. Following this, we will then describe the methodology of the study that informs this article, and then move towards the results of the study and an exploration of Bhutan as a

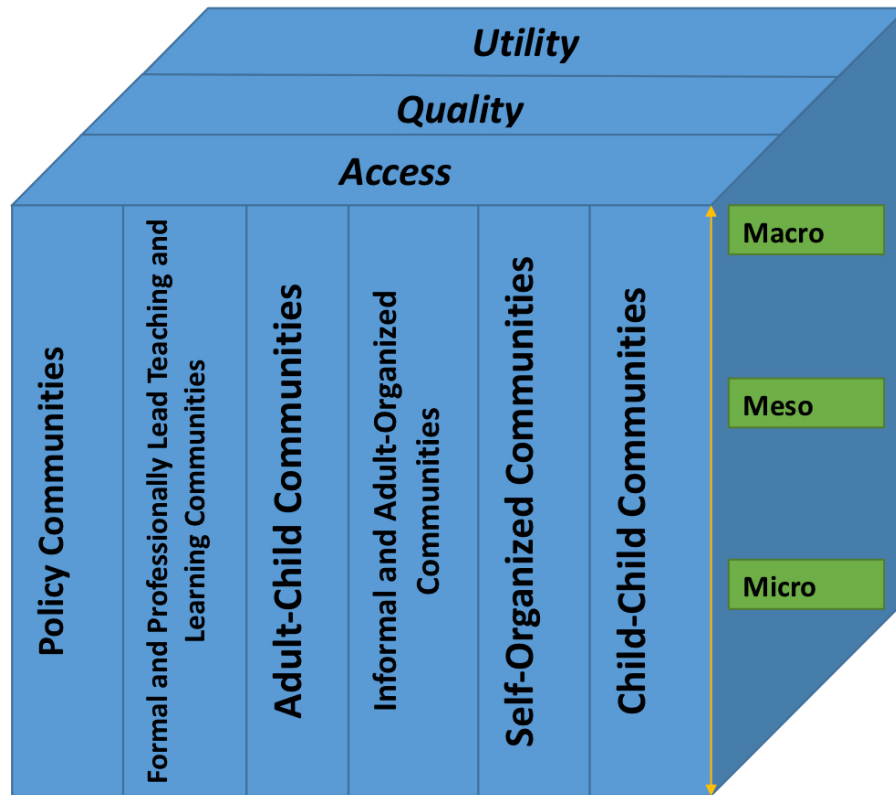
case. Lastly, we apply the EVED Framework to the Bhutan case study to illustrate how the Framework can be used to demonstrate educational values alignments and misalignments.

### **Complex Education Systems and Educational Values**

Approaching the question of the purpose of inclusion and diversity in education helps to begin a larger exploration of the complexity of education systems. For Biesta (2015), there are three purposes, or utilities, of an education system: *qualification* (the symbolic manifestation of knowledge gained), *socialization* (the teaching of children to be a part of a society), and *subjectification* (the teaching of children to better understand their independent selves). These domains do not exactly co-exist equally in any education system, and there is often a tension between them – particularly when it comes to political ideology and orientation (Jones, 2013). Education systems often swing like a pendulum – or, if you like, ricochet like a pinball – between emphases on ‘core’ learning of knowledge, and emphases on promoting more ‘holistic’ learning. As Biesta (2015) would aver, we are certainly in a political period that is very much focused on qualification and ‘learnification’ above all else.

Schuelka and Engsig (2020) used the work of Biesta and others to build a theoretical model to recognize and understand complex education systems: ‘Complex Education Systems Analysis’ (CESA), represented in the form of a cube (CESA<sup>3</sup>). The CESA<sup>3</sup> represents a three-dimensional approach towards understanding education as a complex system, which is defined as an “open system in which elements are interacting with themselves and their environment in emergent, adaptive, and self-reflexive ways” (Schuelka & Engsig, 2020, p. 6). Education can be understood as a complex system by examining and analyzing the three dimensions – across different levels of a system from micro to macro; across different community groupings and depths; and across the three attributes of access, quality, and utility. The attribute of *access* is perhaps the best understood idea as advocacy for education as a human right, and there has been greater attention paid towards increasing *quality* as a result of increasing access. However, we believe that *utility* deserves far greater attention and that it influences other attributes and dimensions. What we argue is that *utility* means more than just the end result of inputs and processes. Educational utility is a teleological question – the overall purpose and conceptualization of education in society, and for *whom* it was designed, rather than analyzing how outcomes were arrived. The visual representation of the CESA<sup>3</sup> can be seen in Figure 1.

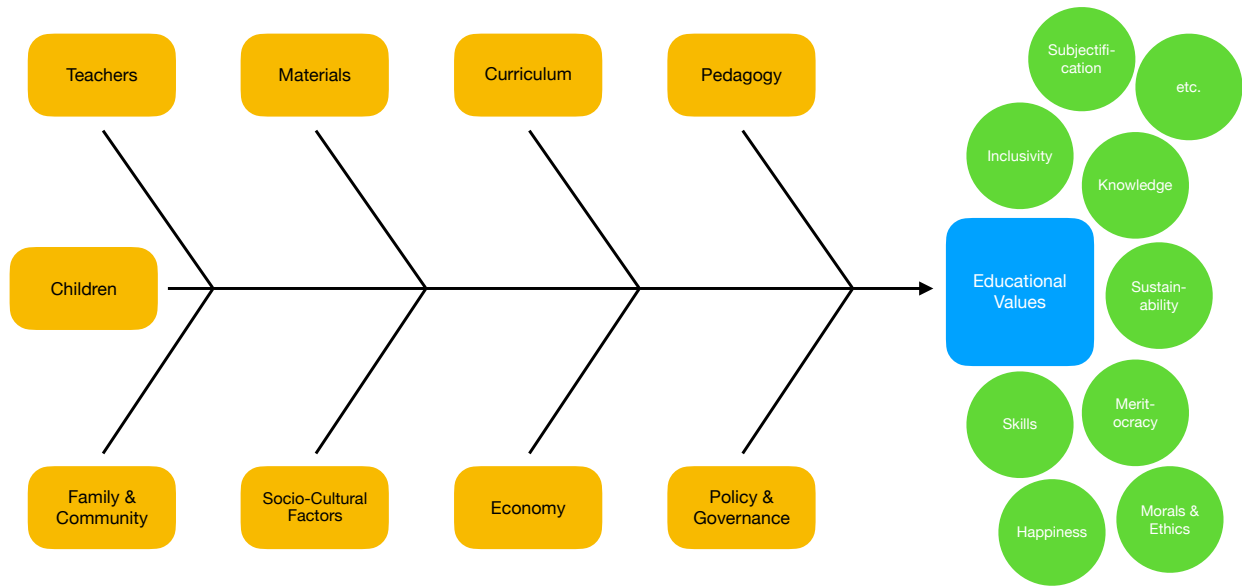
**Figure 1**  
*The Complex Educational Systems Analysis Cube (CESA<sup>3</sup>)*



Source: Schuelka & Engsig, 2020, p. 6

If the CESA<sup>3</sup> serves as a larger theoretical model for understanding complex education systems, an analytic tool developed to explore the alignment of educational values within a complex system can further ground the CESA<sup>3</sup> in practical application. As a result of our educational values project in Bhutan, an Educational Values Evaluation and Design (EVED) Framework was created during the data analysis stage. This framework further breaks down various elements of a complex educational system and in how they inculcate – or fail to promote – educational and societal values across levels, communities, and attributes. The EVED Framework is visualized in Figure 2 below.

**Figure 2**  
*The Educational Values Evaluation and Design Framework*



The EVED Framework uses an Ishikawa design format to highlight various elements of a complex education system that inform how an educational and societal value is expressed. Using this framework can uncover where alignments and misalignments occur within an education system that expresses the desire to achieve certain values within itself. In Figure 2 above, some examples of educational values are presented, although this is certainly not an exhaustive list. Values such as inclusivity, sustainability, and happiness are assumed to be positive and desirable for inculcation within an educational system. Other values such as *what* and *whose* knowledge and skills are learned, morals and ethics are preferred and meritocratically advanced through the system can be contested and assigned positive or negative connotations.

Nine element inputs are identified that inform the production of any educational value but, again, this is not necessarily exhaustive. These element inputs include children, teachers, materials, curriculum, pedagogy, policy and governance, the economy, socio-cultural factors, family, and community. Each one of these elements can further be broken down. For example, 'teachers' is a broader element that encompasses aspects such as pre-service training, in-service training, and incentivization; as well as de-/motivating factors such as stress, burden and scope of work, wages and compensation, autonomy, agency, efficacy, social pressure, and many more. Each element is interconnected and consistent with the theoretical underpinnings of the CESA<sup>3</sup> and other ecological and complex systems theories (Anderson et al., 2014; Walton et al., 2020). In other words, elements

should not be thought of as isolated inputs but as reflexive elements in a complex system that can only ever fully support educational values when they are collectively aligned.

If any element of the education system is misaligned with the values being purported by other elements, particularly as dictated by official policy, then the educational value will have difficulty in being effectively produced. This misalignment will be made clear in presenting the case of Bhutan in subsequent sections. However, we believe that these misalignments have been observed in education research for quite some time, usually in the guise of ‘barriers’ or work on the policy-practice gap. Inclusive education research and advocacy is well-aware of the gaps between policy and practice in the form of resource allocation, teacher training and incentivization, inflexible national curriculums, ableist pedagogies, and especially the socio-cultural ethos of the school environment. What the EVED Framework offers is a proactive approach towards more effectively analyzing system mis-/alignments and *designing* positive educational values such as inclusivity by understanding that it is never a single lever alone that must be pushed to make a system more inclusive. The EVED Framework invites educational reformists and advocates to actively use it to construct and enact a theory of change.

The EVED Framework emerged from our project examining educational values in the Bhutanese educational system. This project will be further explained and discussed for the remainder of this article, furthering the argument that inclusion as an educational and societal value needs to be aligned across an entire complex system to be effective.

### **Methodology**

The research that informs this article was carried out for two years from 2018–2019. We were interested in the balance of values and aims in education centered around a ‘4H’ framework of *head, heart, hands*, and – newly introduced by us – *happiness*. A more in-depth exploration of the 4H framework and the place of ‘happiness’ in educational values has been published elsewhere (Kezang Sherab & Schuelka, 2021; *forthcoming*). The research design was a qualitative study consisting of focus groups and observations. In total, we conducted 24 focus groups of approximately 240 participants ranging from Class 4 students to university students; and teachers at all levels (12 out of the 24 focus groups were teachers, conducted separately from the student focus groups). We also conducted day-long observations at 12 schools. The students involved in this research were not pre-determined or selected by the researchers, and we encountered a diverse mix of genders, socio-economic backgrounds, and abilities within every focus group conducted. The participants were selected by teachers and school leadership, which we acknowledge could be a limitation to representation in the study. Nonetheless, we observed a diverse mix of participants ourselves when the participants came into the classrooms where we conducted focus groups.

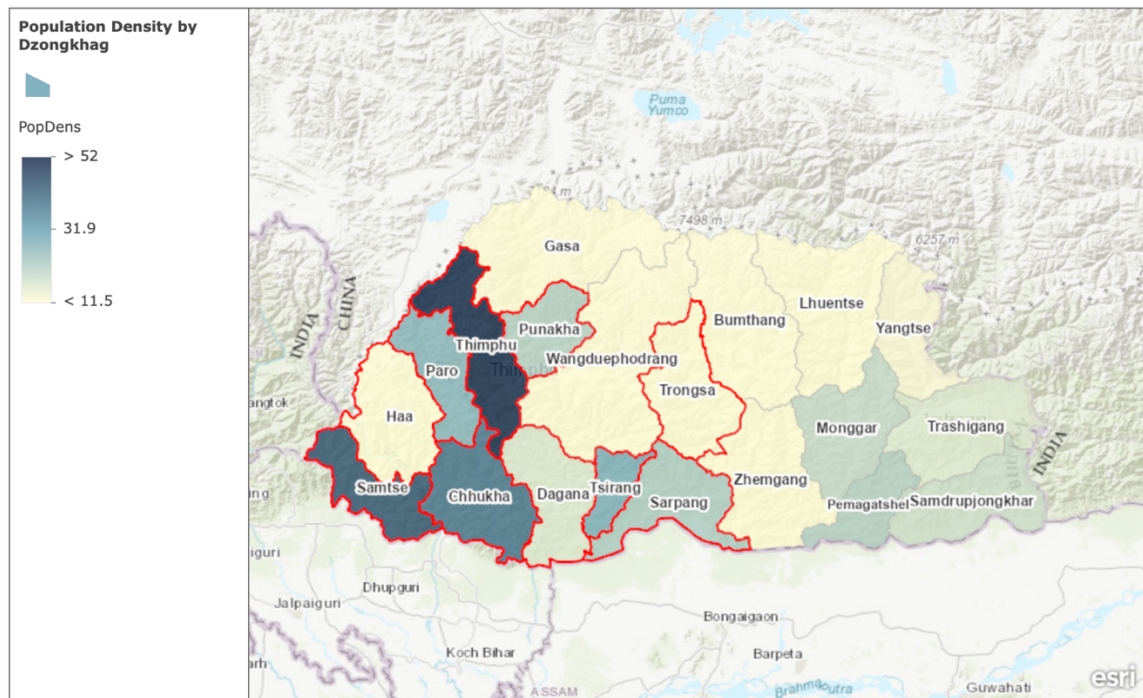
Many of the school sites where we did our data collection were Central Schools, which in Bhutan means a boarding school that draws their students from both the local community and from across the country – children are essentially assigned a school to attend by the Royal Government, which could be on the other side of the country from their home. The data from the focus groups were recorded and transcribed, and both the focus group transcriptions and structured observation notes were analyzed using a grounded theory approach (Corbin & Strauss, 2008), employing thematic and inductive coding (Saldaña, 2009), and triangulated via three concurrent independent researchers and a constant validity check (Bernard, 2013). Our study schools were located throughout the central, south, and west of Bhutan, representing 10 out of 20 *dzongkhags* [districts] and a significant



range of demographic (urban-rural) and geographic (high altitude-low jungle) settings. A map of our study *dzongkhags* can be seen highlighted in red in Figure 3, which also displays population density to indicate the diversity of settings. This study does not purpose to be statistically representative of the whole of Bhutan but, given the homogeneity of the Bhutanese education system across all settings, certain central themes and commonalities may be observed. In the end, each participant's voice can only be representative of their own experience and worldview.

**Figure 3**

*A Map of Bhutan Indicating Dzongkhags Researched and Population Density*



### A Brief Introduction to Bhutan

Given the limited space, we will not attempt to explain the entirety of the Bhutanese socio-cultural-historical context. A more comprehensive look at the historical and contemporary context of education in Bhutan can be further explored by works from Karma Phuntsho (2013), Schuelka and Maxwell (2016), and Robles (2016). However, we will provide a brief introduction below to help understand the next section.

Bhutan is located entirely in the Eastern Himalaya surrounded by India to the south and China (Tibet) to the north. It was never colonized and remained relatively isolated – except for regional interactions primarily with Tibet, Assam, and Sikkim – until the 20<sup>th</sup> century. In the mid-20<sup>th</sup> century, a modernization and development strategy was put in place that continues forward today in terms of focus on establishing and improving infrastructure, education, and healthcare (Karma Phuntsho, 2013). In the 1970s, His Majesty the Fourth *Druk Gyalpo* [Dragon King] of Bhutan, famously called for a development focus of 'Gross National Happiness' rather than Gross National Income. This alternative focus on societal harmony and well-being has become a major source of



pride for the Bhutanese, and an inspiration for progressive development professionals and economists ever since (Karma Ura & Karma Galay, 2004).

Government-provided secular education began officially in 1959, although it did not gain much traction until the 1970s and 1980s with the formalization of a written form of the Dzongkha language and the localization of the curriculum (Singye Namgyel & Phup Rinchhen, 2016). The language of instruction in Bhutanese schools today is primarily English, with Dzongkha taught as its own subject. Across all levels of education, from early childhood to adult, there are more than 195,000 students in a form of schooling (MoE, 2019). This is approximately one-quarter of the entire population of Bhutan. Schooling is free and universal from pre-primary until Grade 10, with an upper-secondary and tertiary education provided free for students with high passing marks.

In the early days of the formal secular education system, there was almost no precedent and nearly everything – including books and teachers themselves – was borrowed from India, and presented in Hindi (Jagar Dorji, 2016). Schooling was directly and explicitly linked with human capital development, and colleges were located within their corresponding ministries. For example, the teacher training institutes were within the Ministry of Education. Formal education was viewed as a sieve to select and promote astute pupils and recruit them into the civil service. All other students failed out – or dropped out – of school and went back to farming and other manual labor work. However, this dynamic has not changed significantly today even though much in society has changed dramatically. Bhutanese schools are more inclusive, and many more students succeed, but youth unemployment is high (NSB, 2018). Those that received an education but are not accepted into a civil service office job and do not desire to enter a life of hard manual labor, are faced with an anemic private sector that has struggled to promote entrepreneurship and further technical training (Lham Dorji & Sonam Kinga, 2005). Bhutanese students express strong national pride and a Buddhist ethos and value-set, but also find that the knowledge, values, and skills that they learn in school do not align with greater society or their adult goals. This will be further elaborated upon in the next section.

**Findings: “I don’t think it’s helping us to be a better person”**

In order to understand what kinds of educational and societal values are being fostered in Bhutanese schools, we asked our focus groups fairly simple questions that elicited deep and complex answers. We asked questions such as: ‘Why do children go to school in Bhutan?’, ‘What do children learn in Bhutanese schools?’, ‘How does going to school make you feel?’, and ‘What is an ‘educated person’?’ What we wanted to locate within these broad questions were different elements in the education system that perpetuated certain values. In comparing these resulting values with the explicit value aims of official educational policy and curriculum, we can better target misalignments within the system. The value of inclusion is wrapped within larger questions of the purpose and perception of school in Bhutanese society. Results will be organized and presented within the three domains of the CESA theoretical framework of Access, Quality, and Utility. Because access to schooling has been fairly established in Bhutan through policy and practice and all children in Bhutan have the right to equitable access (RGoB, 2019), we only include Quality and Utility as findings sections because this was the focus of our study. As argued by Schuelka and Engsig (2020), the theory of complex systems is that there are not rigid barriers between domains and elements, and thus the reader will note that findings in Quality and Utility will not be so cleanly divided.

***Quality: What is Learned Inside and Outside of School***

One aspect of quality in education systems is curriculum and what is learned (or not learned) that supports the utility of education in a particular society. There is an inherent paradox in Bhutanese culture when it comes to formal schooling, in terms of what is valued and preferenced culturally. When our participants were asked about Bhutanese culture, this was most often romanticized as being something located in egalitarian rural village settings, centered around agricultural rhythms, anchored in a local Buddhist worldview, and inculcated through *Driglam Namzha* [formal and informal Bhutanese rules for social etiquette]. However, almost none of these ideas existed in the formal school setting, further supporting long-extant theories of ‘modern’ schooling as representing a significant break from ‘traditional’ societies (Fuller, 1991; Spindler, 2000). To the majority of participants, going to school was equated with social advancement to more urban settings and jobs that required a formal education. Reaffirming previous work on non-cognitive skills in Bhutanese schools (Schuelka et al., 2019), students from this wider sample set located the actual teaching of socio-cultural values as something that occurred *outside* of the classroom, specifically in extracurricular activities. This has also been a challenge in trying to implement educational reforms in Bhutan centered around Gross National Happiness, in that teachers and school leaders viewed these as ‘extra’ rather than integrated in their everyday lessons (Kezang Sherab et al., 2014). Inclusion and diversity in education was also viewed as ‘extra’ and not within the core values of the educational institution.

The Bhutanese school system serves to self-perpetuate its own *raison d’être* by preferencing and promoting only the kinds of recognized learning that advanced students towards a qualification. This might have better served the Bhutanese educational system in the past, when its purpose was to find a narrow band of apt candidates to enter the civil service ranks while all others continued a life of agricultural subsistence. However, the changes in Bhutanese society have now rendered this kind of educational system design to be ineffective at best, and self-destructive at worse. Nearly all children in Bhutan attend school, including those labelled with ‘disabilities’ – and, significantly, a vast proportion of students with learning difficulties that struggle academically and drop-out thinking that *they* were the problem and not the school (Schuelka, 2018). The Bhutanese civil service cannot accept a majority of those that apply today and simply having passing marks and a qualification of learning is not enough. The young adults that simply pass out of lower secondary (Class 10), upper secondary (Class 12), university (Class 15), or are not selected based on their mark on the Bhutan Civil Service Examination (BCSE), are essentially now stuck “betwixt and between” (Turner, 1967). Youth do not have the knowledge, skills, or the desire for a life of farming, nor do they have many options to use the academic knowledge and skills they acquired in school. Again, this has implications for inclusion and diversity in education in that it reinforces that schooling is only effective for some and begins to call into question the purpose of schooling if it only serves as a promotion for a few.

The most glaring example of the mis-matched values of quality schooling and society comes in the form of examinations. Students must take examinations at the end of every year to determine whether or not they will advance to the next class. At the time of our field research this was for every class beginning in pre-primary, although at the time of writing this is in the process of being changed for examinations to now only begin in Class 4. There are also new policies being phased in for alternative assessments and accommodation requirements for students labelled as having a ‘disability’ (RGoB, 2019). There are major examination events at Class 10 and Class 12 that essentially determine a students’ future advancement – and their overall future in many ways. Examinations and

examination culture are a source of immense stress and worry for students, and all of our participants – both teachers and students – expressed this. Students in Bhutan are publicly ranked, with students that passed and students that failed announced for all to know. There are clear linkages here to the Indian education system that was brought into Bhutan – with a reliance on textbooks and intense, rigid, examinations that distil the entirety of learning into one summative examination. This Indian education system, of course, was in many ways learned from their British colonizers (Gupta, 2006). Regardless of its origins, the most significant misalignment of educational values is centered on examination culture and its effect on the educational system as a whole, producing failure, ‘difference,’ and ‘disability’ throughout the system (Schuelka, 2018). Failing examinations equates to failing to advance towards the narrow future pathways that schooling has created. Both students and teachers in our focus groups questioned the purpose of examinations, particularly in their efficacy to assess learning. One teacher said, *“Students are taught to take exams, but they don’t learn anything.”* A student in a focus group expressed the following:

*I guess from my point of view, examination is not like, they’re not checking what we have learned. They’re just checking what we have memorized from the textbook [agreement amongst respondents]. Examinations in Bhutan, like I don’t think it’s helping us to be a better person in the future. They are just checking what we have memorized.*

The teachers were frustrated with the role examinations played in narrowing the curriculum and, in particular, how they spent their time in the classroom pedagogically. A discourse of ‘21<sup>st</sup> century schools’ and ‘21<sup>st</sup> century pedagogy’ has proliferated in the Bhutanese educational system, with much pressure being placed on teachers to teach differently but with the same scripted curriculum and the same materials. In a focus group, one exasperated teacher stated, *“How can we teach 21<sup>st</sup> century pedagogy with 20<sup>th</sup> century curriculum?!”* This sentiment further confirms previous research that we have conducted in Bhutan, whereas teachers felt that the national curriculum was extremely over-subscribed, and they did not view their role beyond being deliverers of academic content that would be formally examined (Schuelka et al., 2019). This lessened every-day inclusive opportunities in the classroom, as teachers focused on getting through curricular learning content rather than ensuring student participation and individual learning trajectories (Schuelka, 2018).

School knowledge – i.e., what was on the examination – was viewed by our participants as something entirely separate from the practical skills and cultural knowledge needed for adult living in Bhutanese society. This sentiment is represented in the student focus group excerpt below:

Interviewer:	<i>Why are you going to school? For what purpose are you going to school?</i>
Respondent 1:	<i>To study.</i>
Interviewer:	<i>Why is studying important?</i>
Respondent 2:	<i>Because if don’t study we will not get job in the future.</i>
Respondent 1:	<i>We come to school because to study. Because if we study, we can be a successful person and we don’t have to depend on anyone.</i>

This is an elucidary exchange in many ways, but not least because of the extraordinary statement at the end stating, *“we don’t have to depend on anyone.”* A sentiment such as this goes very much against the grain of Bhutanese cultural discourse that is informed by a Buddhist worldview. The dominant message in Bhutanese culture is one of inter-dependence and inter-connectedness. However, this is not the culture that is being

inculcated in Bhutan's schools. This finding further speaks to theories on educational utility and the enactment of 'modern' schooling and a 'modern' economy on already-established socio-cultural-economic systems (Demerath, 1999; Fuller, 1991; Grindal, 1972; Katz, 2004; Schuelka, 2013; Spindler, 2000).

***Utility: Why What is Learned in School Matters for Society***

One aspect of the utility of education is the notion of how schooling contributes to the societal notion of 'success.' To the students of Bhutan, schooling was very much viewed as a means towards learning knowledge to eventually earn a qualification that leads to a work as an adult. Being a 'successful person' was explicitly linked to work and economic societal value. In other words, schools are inculcating children to be "preoccupied with the future" (Sherman, 1997, p. 123) and to directly equate success in school as preparation for success in adult society. However, even though the discourses and culture of schooling in Bhutan promote the notion of an "educated person" (Levinson et al., 1996) as one of academic achievement and promotion, there is still a reverence for rural agricultural life and a perceived dignity in hard farm labor and egalitarian rural village culture. Indeed, most students in Bhutanese schools come from rural agricultural settings and a vast majority of the students surveyed in our focus groups had parents/family members that were illiterate farmers. This is also reflected in the overall census statistics for the country, which finds that nearly 80% of the country are employed in the agricultural, construction, and natural resource sectors (NSB, 2018). Most Bhutanese adults and families are subsistence farmers, with a small amount of cash-cropping and goods exchange. Tellingly, there is a significant correlation between educational attainment level and unemployment, but in reverse of the mythology of human capital development – the more education one receives, the more likely they are to be *unemployed* (NSB, 2018).

The narrative linkage between school success and societal success – even if it does not reflect current socio-economic reality – has profound implications for inclusion and diversity in education as an educational and societal value. If children and adults believe fully in a meritocratic system of social advancement, then those that do not excel or otherwise struggle in formal schooling lose value within the system. This is what Schuelka (2018) found in previous ethnographic fieldwork, when students labelled as having a 'disability' in Bhutan were most often associated with 'being lazy' and not working hard enough to do well. This also builds upon the work of Ray McDermott and others (1998) in articulating how schooling – and the purpose of schooling – *produces* 'disabilities' through the narratives of success and achievement.

Beyond expressing the socio-economic utility of schooling in Bhutan and the idea of a 'successful person,' there was also a strong sentiment of going to school for the benefit of Bhutan beyond just their own self-interest. One student expressed this sentiment:

*But what we have to do is being an educated person, we have to convey the message to our own parents. We have to convey them and we have to help them. We are not supposed to go and fight with them. We have to take our culture with us because our culture is identity of our country. And it's in our hands to save it. And we have to go with the modern technologies because we have to compete with the other modern world. So it's all in our hand...it's somewhat like understanding and belief that we need to create and we must give a very strong support to our own creation.*

This expression of education for the benefit of the nation-state is an old sentiment, and one of the primary catalysts for mass education expansion in 19<sup>th</sup> century Europe that then spread worldwide (Ramirez & Boli, 1987), although not always naturally or with benevolent purpose. In Bhutan, nationalism is strongly inculcated in the educational system and embodied in the production of *tsha-wa-sum*, which is originally the Buddhist belief of the 'Three Roots' but contemporaneously has also come to mean the nationalist notion of 'King, Country, People.' This should not be considered as indoctrination, but more an emphasis on thinking beyond the self and towards contribution to the whole, which certainly sits squarely in the Buddhist worldview. This is why the sentiment expressed earlier by one student – “*we don't have to depend on anyone*” – is so extraordinary.

If we were to simply analyze the language of Bhutanese educational policy, a far different picture of Bhutan would emerge. Education policy in Bhutan is very much constructed with progressive aims, featuring an emphasis on Gross National Happiness and a holistic approach to learning (Schuelka, 2017). For example, Bhutanese national education policy has two aims, to create an education system that:

- Inculcates the principles and values underpinning Gross National Happiness, and upholds the nation's unique cultural and spiritual heritage and values; and
- Prepares citizens to become knowledgeable, skilful [Bhutanese spelling], creative, innovative, enterprising, and capable of responding to the national needs and emerging global trends (RGoB, 2019, p. 2).

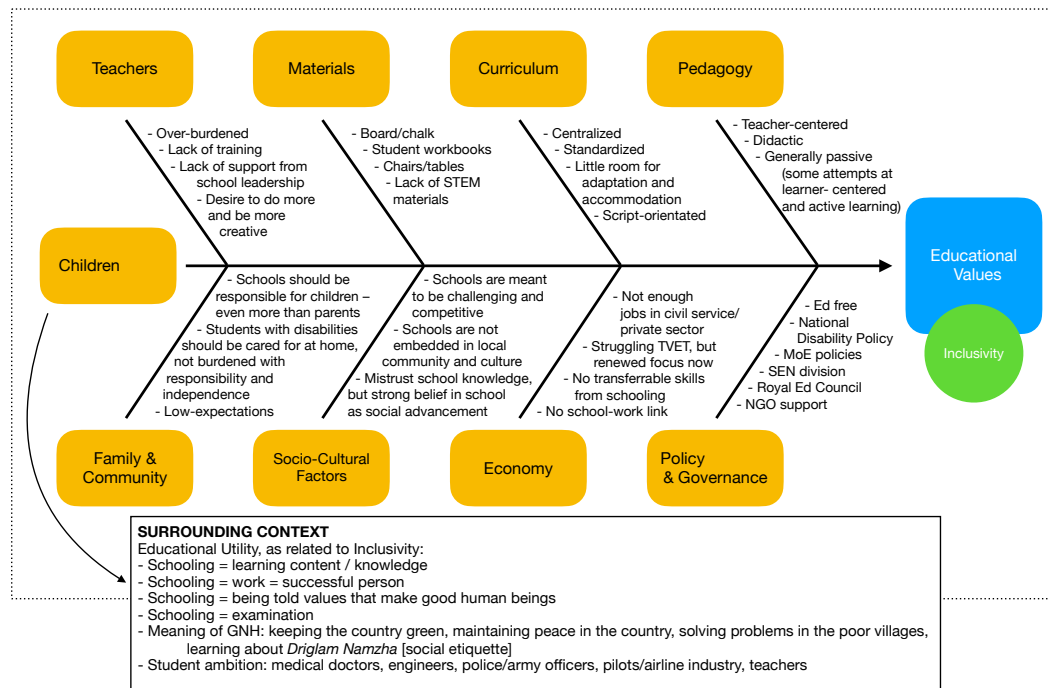
However, looking at a complex educational system from policy alone presents a very myopic and misunderstood picture of the whole. What is especially missing in most analyzes of education systems is a focus on what going to school actually *does* for a student – not only in outcomes related to learning, but also in how schooling adds value to a student's wellbeing, socialization, self-identity, and subjectification. When thinking specifically about inclusive education, there must be more attention paid towards how an educational system is cultivating *all* students' sense of belonging, self-worth, resilience, and creativity. Students must share the opinion that school is offering them utility in terms of a successful future that goes beyond economics and social status.

In the next and final section of this article, we will use the EVED framework to provide an example of the misalignment of elements in the Bhutanese education system as it relates to the values of inclusion and diversity in education. This will bring forward the discussion from this section on educational utility and values as expressed by participants in Bhutanese schools. We will then conclude the article with a suggestion as to how to apply the EVED Framework to other cases and contexts to evaluate and design better inclusive education systems.

### **Educational Values, Utility, and Implications for Inclusion**

In this section we will present an example of how the EVED Framework can be applied to locate where the educational value of inclusivity is misaligned in the Bhutanese educational system. We could not go through all of our findings from this project in the section above, so there will be some findings in Figure 4 below that have not been discussed here. Nevertheless, we will mention them briefly in a summary of our evaluation.

**Figure 4**  
**EVED Framework Application on Inclusivity in the Bhutanese Education System**



In analyzing the Bhutanese educational system via the EVED framework, the element of Policy & Governance is the most proactive in supporting inclusivity as a value in the system. There are policies in place that support educational access and inclusion for children, a holistic vision of the child centered around Gross National Happiness (GNH), and generally a discourse on a human right to education (RGoB, 2019). The National Education Policy draft is filled with assertions such as “Schools shall foster best practices and promote innovative methods to engage students and develop their full potential and life-skills,” “Teachers in public schools shall be provided with appropriate and required teaching materials and stationery,” and “All schools shall promote core values and facilitate productive and critical engagement in society as active and informed citizens ... schools shall teach the country’s spiritual and cultural heritage throughout schooling and develop civic, financial, entrepreneurial, environmental, media literacy, and provide life skills education programmes” (RGoB, 2019, pp. 4-5). However, the practices and cultures within schools work against a progressive vision of GNH Education through elements such as rigid, inadaptible, and irrelevant curriculum that has not caught up to the policy; a pedagogical style that disables many children included in the classroom (see Schuelka, 2018); a lack of hands-on and adaptable materials for learning, particularly in science and mathematics; teachers that are over-burdened, not given enough agency and ownership, and are incentivized only to ‘get through the syllabus’ through contradicting policy directions and incentives.

Outside of in-school practices and cultures, there are also socio-cultural factors that exert different pressures on the educational system and its values. The Bhutanese school system was designed to feed able and successful students directly into the civil service, but that is no longer the socio-economic reality in Bhutan. The educational system remains an

examination-centered qualification generator but needs to adapt to the current scenario and produce better students that can enter the private economic sector, gain skilled technical jobs, create new areas of economic opportunity, and contribute to greater Bhutanese society by inhabiting positive Bhutanese socio-cultural values. The Bhutanese place a great deal of weight on the importance of schooling in terms of social advancement and better economic opportunity, but in many ways the educational system no longer perpetuates this narrative for most of its students.

In terms of the surrounding context of educational utility, most of our focus group discussions focused on school as meaning future work, examinations, and content memorization. However, there were instances where our participants expressed the possibility of school meaning more in terms of producing Gross National Happiness and better citizens and contributing to the common good of the nation. Nearly all the children we interviewed expressed a desire to support their parents in some way and to contribute to their home village. This should not be understated or overlooked. However, children were nonetheless well-aware of the expectations of doing well at school and that socio-economic success was a vehicle for them to support their parents in tangible and material ways. The desire to do good – for their parents, for the nation – shaped our participants' understanding of success as measured through academic achievement and ability.

The understanding of educational utility in Bhutan as one of achievement and advancement towards work and 'success' has a major impact on the value of inclusivity in the educational system. Because schooling is conceptualized and designed primarily upon the ability to advance academically – to prove oneself within a narrow set of examination and book learning skills – a child that struggles with these specific skills, or progresses differently than their peers, is now 'on the outside looking in.' The utility of the educational system is one of producing a specific type of success, and many children will be marginalized and excluded as a result. The uncomfortable question here is "why would an educational system include children for which it was never designed to produce in the first place?" This is exactly why the current challenges and tensions exist within the inclusive education field.

The EVED Framework is one tool that can be used to help locate and evaluate interconnected elements within a complex educational system that can begin to be nudged in the right direction. If an educational system was only designed and narratively sustained with a purpose of academic achievement, ability, and success – with the only measurable outcomes being graduation and transition to higher education and work – then it will never be inclusive for all children. However, we believe that using tools like the EVED Framework and others can support innovation and design-solutions towards more inclusive educational systems by understanding these systems as dynamic and complex.

With a complex education system, we must be fully cognizant that it is never just a single nudge within a single element that will make the difference. In this project on Bhutan, it was found that the Ministry of Education initiative encouraging teachers to use more active learning and learning-centered pedagogy only exacerbated problems as the curriculum did not adjust to different modes of learning, nor were lessons and the school day structured differently to allow for more flexibility. Teachers did not feel that they had agency and ownership of their classrooms. Promoting learner-centered activities just became yet another thing that the teacher had to fit in as 'extra.' While they liked these activities and found that the students were more engaged, it was also something that they believed they could only do once they reached the end of the syllabus and if there was


any extra time. In other words, adding pedagogical innovation was useless when there were not changes that also happened to the curriculum, to the examinations, to the materials, to the culture of the school, to the support and incentives for teachers, and so forth.

In closing, it is important to note that the EVED Framework is meant to be situationally and contextually sensitive and specific. We are not advocating for the EVED Framework to be used as a comparison of values across nations (Lee & Manzon, 2014). This is not to ignore the fact that education is a complex globalized discourse of borrowing, learning, exchange, convergence, and coercion. In our project in Bhutan, we are careful not to project novel exogenous values and notions onto the existing educational system. As we argue in this article and others, it is the Bhutanese educational system *itself* that seeks to promote values of inclusion, happiness, sustainability, and so on. These are explicit in national policies and macro-level discourses, but not enacted and produced at the mesa- and micro-levels. In other words, the system has a values misalignment amongst its elements. Using the EVED Framework is simply a tool to support any education system in understanding how and where educational values are formed and produced within it, and to evaluate where to make better design choices to further the kinds of values that the education system desires.

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<sup>1</sup> A note on Bhutanese naming convention: Bhutanese names are not structured as a given name followed by a family surname. Most Bhutanese names are one or two given names, which are often interchangeable and nongendered. Thus, Bhutanese names cited in this paper are written out and alphabetized according to their first given name: a culturally-appropriate referencing convention argued by Schuelka and Maxwell (2016).



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## Book Review

*Becoming Rwandan: Education, reconciliation, and the making of a post-genocide citizen* by S. Garnett Russell  
Rutgers University Press, 2020, 255 pp. \$28.95 (paper)  
ISBN-10: 1978802862

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In *Becoming Rwandan: Education, reconciliation, and the making of a post-genocide citizen*, S. Garnett Russell (2020) draws on data collected from surveys, analyses of policy documents, curriculum and textbooks, observations in schools, and interviews with students, teachers, government officials, educational policymakers, and academics to present an insightful examination of how the Rwandan government's intended educational policies, designed to create peace and reconciliation in the post-genocide period, are implemented on the ground in local contexts. Russell provides a convincing argument that while the Rwandan government uses global discourses of human rights and peacebuilding in its educational policies and curricula, as local actors, both teachers and students interact with these discourses in ways that alter the aims of the government, leading to unintentional outcomes and compromising long-term peacebuilding efforts. She utilizes the concept of "decoupling" from sociological literature to describe what happens when national-level educational policies and local practices do not align. Through her argument, she shows that the Rwandan government carefully selects global models of human rights, peace, and justice to maintain legitimacy on the world stage, while silencing the controversial nature of certain topics, namely ethnicity and its link to the 1994 genocide. However, as Russell's book demonstrates through an interweaving of rich data from ethnographic observations, interviews, and survey results, teachers and students are active actors with agency, who through their engagement with these global discourses, challenge and interpret them in their own ways. Her argument conveys the strengths and weaknesses in using education for peacebuilding and nation-building processes in post-conflict contexts.

Following an introduction to the study and the theoretical concept of "decoupling" (chapter 1) as well as a thorough discussion of the global increase in judicial and nonjudicial mechanisms in post-conflict societies and using examples from South Africa, Sierra Leone, Peru, and Guatemala (chapter 2), Russell presents a review of the mechanisms intended to bring peace, transitional justice, and reconciliation to Rwanda, including within the education system. She then turns to her argument that despite the Rwandan government's attempts at peacebuilding via these educational mechanisms, national policy efforts rarely align with local realities. The remainder of the book (chapters 3-5) is dedicated to supporting her argument through an in-depth analysis of survey and ethnographic data collected in the capital city of Kigali, a Western province, and an Eastern province in Rwanda. She closes (chapter 6) with a reflection on the possibilities and limits of using education for peacebuilding in Rwanda and beyond.

The combination of Russell's interdisciplinary approach and variety of methodologies used to conduct the research are essential to the merits of the book. In addition to analyzing national policy documents and curricular materials, Russell spent eleven months in three regions of Rwanda collecting data from a total of fifteen varied secondary schools in the form of surveys, observations, and an impressive number of interviews with individuals from multiple levels of Rwanda's education system. Collecting data across these different regions and schools allows her to paint a rich picture of the diversity present in the perspectives of teachers and students towards human rights, citizenship, and peace and reconciliation in Rwanda. The depth of Russell's findings presented in chapters 3 through 5 might easily overwhelm the reader; however, her skillful use of historical and theoretical literature alongside the analysis of her data throughout the book helps to guide the reader towards understanding her main points. The outcome is a smoothly written blend of Rwandan history, peacebuilding and transitional justice literature, sociological theory, and the voices and experiences of her research participants.

In chapter 3, Russell describes how the Rwandan post-genocide state utilizes the education system to create a new civic identity intended to generate peace and reconciliation. Throughout this and the subsequent chapters, she peppers her analysis with data from interviews and surveys, even including bar graphs as helpful visualizations of key statistical results from her study. Using data from surveys and interviews with students and teachers, coupled with her analysis of curriculum and policy documents, she shows that schools in Rwanda are used by the state to shape this new identity: a nonethnic Rwandan who is able to converse in English, is devoted to the new Rwandan nation, and has an international outlook. However, her research demonstrates that despite the government's success at creating a patriotic citizen with a global mindset, its attempts at de-ethnicizing identity through education have been limited as students continue to engage with ethnic identity through their distinct languages, family experiences with the genocide, and interactions with others.

In chapter 4, Russell discusses the Rwandan state's use of human rights discourses for peacebuilding and to maintain legitimacy in the international sphere. Through her analysis of educational policy documents, Russell demonstrates that the Rwandan government carefully selects particular human rights discourses—especially those focused on gender equality and the rights of children—while silencing others, in an effort to foster peacebuilding and reconciliation, garner financial support from international agencies, and portray itself to the world community as dedicated to improving human rights. Yet, as her robust data analysis shows, teachers and students take up the issue of human rights differently at the local school level, oftentimes avoiding sensitive topics and discussing human rights more conceptually. The ways that students and teachers interpret human rights is most clearly demonstrated in Russell's keen observations of class discussions wherein they are alluded to as being the important fundamental needs of all people yet there is no direct connection made to Rwandan lives. Russell concludes that the inability of teachers and students to fully engage with the human rights violations of the past not only limits students' development of critical thinking and active learning skills, but also limits peacebuilding in post-conflict Rwanda.

In chapter 5, Russell further explores how the Rwandan state utilizes education to remember the genocide and promote peace. She argues that although the national curriculum in Rwanda presents students with a single narrative which is structured to avoid discussion of ethnicity, the memories of individuals and their families, which contrast with this narrative, complicate efforts for peacebuilding. These complications are most evident in Russell's discussions with Rwandan teachers who describe the need to

strictly follow the national curriculum for fear of imprisonment despite students' questions and comments regarding sensitive topics they learned about at home. As Russell shows, teaching about the genocide for reconciliation remains difficult because of the one-sided narrative which hinders critical thinking as well as the lack of training provided to teachers on how to approach the teaching of contentious issues.

Within the chapters in this book, Russell provides a compelling illustration of how teachers and students, through their engagement with the discourses about human rights, citizenship, and reconciliation presented by the Rwandan state, interpret them differently in their local contexts, leading to a distortion of the government's intended aims and undercutting efforts at creating peace. Russell's book concludes with discussion of the prospects and constraints of using education for peace and reconciliation in Rwanda and other post-conflict societies. Her research not only builds upon that of other scholars who have conducted empirical studies on post-conflict history education in Rwanda (e.g., Bentrovato, 2016; King, 2014) by providing a deeper understanding of how Rwandan teachers and students disrupt national educational goals for peace but enhances our knowledge of how peacebuilding and nation-building efforts are limited at the national level. More importantly, although Russell's work is situated within a particular region and time period, it extends the theoretical debate on global-local dynamics, demonstrating the ways in which global models shape the discourses found in national educational policy documents and curricula and how teachers and students take up these models at the local level. *Becoming Rwandan: Education, reconciliation, and the making of a post-genocide citizen* will be of interest to scholars in the areas of peace education, post-conflict history education, citizenship and civic education, human rights education, education in emergencies, sociology, and African studies, as well as agencies and curriculum developers involved in designing educational programs and curriculum to foster peace and reconciliation.

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## Book Review

*Shadow Education in Africa: Private Supplementary Tutoring and its Policy Implications* by Mark Bray,  
Comparative Education Research Centre, The University of Hong Kong, 2021, 91 pp., US\$16 (paper) or free download  
ISBN 978-988-14241-9-8

**Madison Collins**

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Mark Bray's book (2021), *Shadow Education in Africa: Private Supplementary Tutoring and its Policy Implications*, is the first of its kind providing a comprehensive look at tutoring in Africa, which is most commonly researched in Asia (Bray, 2021, p. viii). On a continent where educational development has taken many forms, Bray draws attention to the educational opportunities privileged students in Africa have access to through for-profit tutoring. His analysis draws on the same aspects of African education that pose challenges to educational development in general, such as an unqualified teaching force, unsatisfactory compensation for teachers, international and region assessments, and the rural/urban divide among student achievement. Bray's book provides a warning to the field of International Educational Development of what could become of African education with increased shadow education or increased supplementary tutoring and provides a guide on how to combat it with policy recommendations that expand the best practices found already in place in some countries. Researchers and practitioners can gain a foundational awareness from this book regarding the implications of global education development standards and the progression of shadow education in practice in Africa.

The author's vast scope of all 54 countries in Africa is bold but unrealized as only a few countries are found to have significant data to quantify shadow education in the region. However, this scope does provide comparison through what data was found. By comparing the quantity and quality of data for Egypt to that of Burkina Faso or Ethiopia, it is clear that some regions on the continent are ahead of others regarding considerations of shadow education. To this point, without any uniform procedure for data collection across the continent focused on private tutoring and its effects, the data is scattered. This scattered data used as evidence to support the presence of shadow education in Africa describes various cases with different populations making it difficult to compare. This lack of uniform data is a finding in itself as it highlights a gap and establishes a first step toward addressing shadow education in Africa. Although the data is not strong, Bray has made it clear it is not too early to consider shadow education and its effects on the continent of Africa. He has found quantitative and qualitative evidence to show it is present in the region and widening the gap between public and private education.

### **Supply and Demand: Teachers**

The development of African countries has often been compared to that of Asian countries, with Asia as an example of a success while African development is viewed as a failure with continued poverty and underdevelopment found throughout the continent (Noman & Stiglitz, 2012). Universal standards for educational development such as the fourth Sustainable Development Goal (SDG) presented by the United Nations and the predecessor, Education For All (EFA) initiatives, create an uneven playing field for the various contexts around the world to achieve simultaneously. Bray argues that these goals have led to an acceleration of shadow education as the result of an increased push for universal access to quality education. Shadow education, through the private sector, can bridge some of the financial gaps and elevate the overbearing responsibilities put on teachers that are created by these global goals.

Many factors, such as the current stage of African educational development, the challenges across the region, and influence from international actors, combine and contribute to a supply and demand situation in favor of shadow education as a commercial good to increase the competitiveness of schooling on the continent. Bray highlights the commodity of education as a “positional good” (Bray, 2021, p.67). Children’s education is an indication of a families’ ability and willingness to afford additional resources like tutoring positioning them above other families who cannot afford this.

The economic impact of shadow education becomes clear through the incentives of teachers and families to contribute to this supply and demand. Teachers feel they are unable to teach the entirety of the curriculum during official school hours, and at the same time are underpaid; while parents want their children to get the best quality education they can. Evidence compiled by Bray illuminates this dynamic, leading to an increase in tutoring by teachers after class time, exclusively for students able to pay extra money (Bray, 2021, p.11). Parents are willing to endure these costs to provide proper preparation for the national assessments that determine students’ success in education (Bray, 2021, p.7). The burden of global educational standards and families’ need for educated children is left to the teachers by completing the curriculum, providing quality teaching, and supporting individual students’ educational needs. These challenges are often witnessed by those working in African educational development contexts, but Bray’s book identifies these challenges in a unique way as contributing to private tutoring. This renewed view of these well-known challenges facing education in Africa puts increased pressure on organizations and governments to address the challenges at the source.

### **The Data**

Through the use of tables, the data is contextualized with details such as the source, year, population, etc. This presentation of data is necessary given the vast differences in data collection and analysis sourced for this study. Unfortunately, this also makes it overwhelming for the reader, difficult to compare, and hard to understand the meaning of the data as evidence for the continent-wide analysis. Of the 54 countries included in this study, only 25 countries are presented in Table 1, which highlights “selected cross-national indicators of shadow education” (Bray, 2021, p. 13). Of these 25 countries, the



author digs deeper to identify differences within groups of countries such as Arabic-speaking North Africa and Sub-Saharan Africa as well as by Francophone, Anglophone, and Lusophone (Bray, 2021, p.11). Bray identifies challenges in gathering data from every country in Africa, such as restricted access or the lack of existence of data on this topic for some countries. With less than half of the countries on the continent represented, making generalizations about the entire continent would be unfair and inaccurate. Therefore, the author's approach to presenting each country individually with the data available through tables helps to contextualize the similarities and differences across the region, but this is left to the reader.

Bray expands his analysis into various areas, such as the business sector, as some tutoring is done through private for-profit businesses, which contribute to the business sector of development for a country. By examining various elements of shadow education such as in rural versus urban settings, the business climate in various African countries, and perceptions of tutoring, Bray is truly "mapping the landscape" as he has titled the chapter in which much of this data is held (2021, p. 13). This comprehensive overview of the data -what little is available- establishes the foundation for continued research of the shadow education situation in the African region. Therefore, after presenting the *landscape* of African shadow education, Bray provides policy recommendations to prevent the recurrence of many of the harmful effects of private tutoring seen in other parts of the world.

### **Bray's Recommendations**

From the data presented in the book, it is clear that there is shadow education happening on the continent and that only some students and teachers benefit from these practices, while most are impacted negatively. Bray outlines what steps governments can take now to prevent a total loss of control of education to the private sector through increased shadow education. The recommendations are categorized into four areas: *securing data and monitoring trends, reforming assessment selection and curriculum, devising and implementing regulations, and developing partnerships* (Bray, 2021, pp. 50-63).

The first section identifies the critiques made in this review that the author assembled a "jigsaw puzzle" of data, but with many missing pieces (see also Bray, 2010, p.3). He notes this as a commonality with shadow education research in general (Bray, 2021, p. 50). Bray addresses the need for a common yardstick to allow for comparison across countries when analyzing the case of Africa in regard to shadow education. Meeting this need should be viewed as furthering the research started through this book and Bray's other works (1999; 2003; 2009; 2010; 2017) and closing the gap made obvious through Bray's findings in this book.

The remaining recommendations are accurate and needed, but they are impractical for the scope of this book. With the scope of this analysis as the entire continent, it is assumed by the reader these are policy recommendations for the entire continent as well. How can assessment and curriculum reform be enacted across the African continent while maintaining individuality among countries? Similarly, how can the same regulations be

implemented across the continent while still allowing for economic competition in the region? Bray assumes all the countries in Africa will eventually succumb to shadow education, so therefore, these recommendations should be employed across the continent to address and prevent its expansion or presence. The author should have spelled out specific recommendations for the various levels of shadow education present in some countries, similarly to how he presented data that was available through tables. Bray does, however, describe practices already used on the continent by some countries to combat the negative effects of shadow education (2021, p. 59). By highlighting current best practices developed by those on the continent, a foundation for further recommendations is built. Finally, the recommendation of partnerships draws the attention of partners already established on the continent to prioritize private tutoring and develop more effective responses.

## Conclusion

The book *Shadow Education in Africa: Private Supplementary Tutoring and its Policy Implications* by Mark Bray examines a new concern for educational development in the African region. His recommendations for expanded data collection specific to shadow education and consistent across the continent is well warranted and address the critiques described in this review. The “scattered” nature of data on shadow education in Africa calls on future researchers of this topic to streamline approaches to collecting data across the continent. This data collection can be done through the partnerships presented in Bray’s recommendations working with organizations already collecting data on other topics throughout the region; for example, national household surveys could include questions regarding shadow education. While his other recommendations are useful, they should be contextualized to each country on the continent regarding the current level of private tutoring taking place and the level of development the country’s education system is in. This book begins the conversations surrounding shadow education in the African region and provides a foundational resource for others to expand through its accessibility to the public via open access online download. I recommend this book as an introduction to the current state of supplementary education practices as they unfold on the continent of Africa as well as a warning to inform practitioners and researchers of the implications of global educational development standards in the region. This book is also a helpful database resource for statistics regarding shadow education in different forms, in different contexts with various populations of students.

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## Book Review

*Shadow Education in Myanmar: Private Supplementary Tutoring and its Policy Implications* By Mark Bray, Magda Nutsa

Kobakhidze & Ora Kwo.

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Working on research projects on South East Asian (SEA) education, I have been interested to understand more about Myanmar's education system. While there has been increasing research on private tutoring in SEA countries such as Cambodia, Singapore, and Vietnam, I wonder if this practice is also prevalent in Myanmar. If the country bears a similar trait in its education system, what lessons can other regional countries learn to deal with this practice? The book *Shadow education in Myanmar: Private supplementary tutoring and its policy implications* is a helpful read for me. Having written extensively on private tutoring, the book's co-authors--Mark Bray, Magda Nutsa Kobakhidze, and Ora Kwo--provided an in-depth analysis of the private tutoring situation in Myanmar.

The book examines private tutoring in secondary schools in Yangon, Myanmar's largest city. It resulted from a collaboration between the University of Hong Kong, the Yangon University of Education, and UNESCO. Using a mixed-method approach, the researchers collected data from students in transition grades (Grades 9 and 11), teachers, and principals of eight randomly selected urban and peri-urban schools. The authors also compared the views of multiple stakeholders, including parents and personnel from international agencies and non-governmental organizations. These perspectives are significant in that while focusing on Myanmar, the book situates private tutoring as a widespread phenomenon that has drawn attention from actors at both the local and global levels.

Along these lines, the first chapter, "*International Perspectives on Shadow Education*," sets the stage for the study by reviewing the development of private tutoring in various countries around the world. This review shows that private tutoring has a long history, and as the name 'shadow education' suggests, it has become an integral part of many education systems.<sup>1</sup> Chapter two provides an overview of the local context of Myanmar pertaining to private tutoring. The authors underscore the National Education Strategic Plan (2016-2021) as the foundation for the current educational reform in Myanmar, echoing other scholars who noted that the country is transforming politically, socially and educationally (Lall, 2013; Lee, 2016).

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<sup>1</sup> The term 'shadow education' was first used by Bray (1999) to suggest that as the mainstream curriculum changes, much of the content in the shadow changes accordingly.

The central component of the book lies in Chapters four and five, highlighting the research's findings concerning the perspectives of students, parents, and teachers. With rich evidence from quantitative surveys and qualitative interviews, Chapter four portrays a broad picture of the scope of private tutoring in Yangon and reasons for students and parents to pursue private classes. The research shows that higher-performing students were more likely to receive tutoring than lower-performing ones as learning achievement was regarded as measurable through examination results. However, the situation remains paradoxical because significant household expenditures were spent on private tutoring. Myanmar parents justified this spending as a legitimate attempt to satisfy the exam-driven curriculum and as an indispensable investment in human capital. Meanwhile, just as in many other settings in Asia (e.g., Kennedy & Lee, 2018), the broader visions of education in Myanmar are still deemed unattainable, including schooling for the public good.

Chapter five provides an insight into the perspectives of teachers related to private tutoring. It is interesting to note that although teachers were strictly prohibited from providing private tutoring, nearly half of the sampled teachers indicated that they had tutoring classes. Also, some teachers thought that their principals were encouraging the practice, while many reported the other way round. These contradictory results indicate the complexity and ambiguity associated with competing forces and variegated relationships in the shadow educator sector. An important inference is that private tutoring bans tend to be ineffective, no matter how fierce they are. This brings us to the next chapter that discusses policy implications related to private tutoring regulations.

In Chapter six, the authors reflect on some fundamental issues around private tutoring, including financing the education system, learning assessment, and parents' rights to invest in their children's education. In this regard, teachers' inadequate salaries and high-stakes exams are reported as major causes for the perpetuation of private tutoring; yet these chronic issues persist not only in Myanmar but also in other SEA countries (Bray, 2002; Duong & Silova, 2021). All things considered, the authors suggest that it is better to regulate the shadow sector rather than eliminate it.

The book proposes two primary areas of private tutoring regulation: (i) regulating private tutoring provided by serving teachers and (ii) regulating the practice in the marketplace. Among diverse views about teachers' provision of fee-based extra lessons, the authors explicitly stated that tutoring current students must not be tolerated because of ethical issues. Nevertheless, tutoring students from other schools, as occurring in the marketplace, appears judicious as it shares the government's responsibility to increase the teachers' salaries. More important is the recommendation for school leaders who should take primary action in handling the private tutoring practice at the school level. Additionally, the authors point to the need to create school-level channels to communicate among teachers, students, and parents regarding private tutoring. Finally, with respect to regulating the practice in the marketplace, the authors suggest attending to the business and education dimensions of private tutoring, including taxation, health and safety, tutors' qualification, and pricing issues. These recommendations are particularly pertinent to transitional contexts where the marketplace for private tutoring is branching out.

This book depicts the first comprehensive picture of shadow education in Myanmar, zooming in on the country's largest city. It contributes to the international scholarship on private tutoring with the exemplary approaches to the mixed methods. I highly appreciate the meticulous integration of qualitative narratives that helps to illustrate and add nuance

to the quantitative data. Given that the statistical analysis is primarily descriptive, audiences interested in quantitative research might be curious to learn about the relationships between aspects of private tutoring potentially derived from the inferential analysis. That said, the book is a valuable reference for comparative education researchers who may take advantage of much information in the book, including sample survey questionnaires and interview guides, to replicate research or compare with other educational contexts. Finally, education administrators, especially school leaders, would find recommendations in this book practical and helpful in addressing an educational phenomenon that, as the authors rightly indicate, will never disappear but calls for collective action for a more equitable and inclusive education system.

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