2023 Winter Issue

Articles

A Transnational Comparative Study of Teachers' Experiences of Remote Teaching and Learning During COVID-19 Pandemic

Satu-Maarit Korte
University of Lapland, Finland

Minna Körkkö
University of Oulu, Finland

Outi Kyrö-Ämmälä
University of Lapland, Finland

Miia Hast
University of Lapland, Finland

Sanna Mommo
University of Lapland, Finland

Merja Paksuniemi
University of Lapland, Finland

Gregor Maxwell
UiT Arctic University of Norway

Mhairi Beaton
Leeds Beckett University

Pigga Keskitalo
University of Lapland, Finland

This article presents the findings of an international comparative multiple-case study that examined the sudden change from classroom to remote online teaching during the COVID-19 pandemic. The study specifically explored the experiences of teachers in Northern Finland, England, and Norway, seeking to provide new information about the education situation and identify the focus areas to guide the education of future teachers. The data were collected in three different ways in three different contexts: via an online survey of in-service teachers in Lapland, Finland (N = 164), and through different semi-structured interviews with teachers in England (N = 20) and northern Norway (N = 30). The data analysis was conducted in two phases. The first phase focused on teachers' experiences in teaching and learning and the second phase on teachers' challenges. The results reflect teachers' desire for additional education on online pedagogy, as well as the significance of teacher collaboration and knowledge sharing.

The findings can be used to develop pre- and in-service teacher education, supporting the dynamic digitization of teacher education programs and policies. We recommend that strategies should be developed for how such programs can strengthen future teachers' interaction, collaboration, and knowledge sharing.

Keywords: online pedagogy, remote teaching, teacher education.

Introduction

The global lockdowns during the COVID-19 pandemic impacted everyone's lives. This comparative study examines the experiences, especially teachers' perceptions and challenges, in Finland, England and Norway during the global pandemic. The aim of the study reported in this article was to contribute to knowledge about the competencies required by educators to effectively respond to societal challenges through education provision which has fundamentally altered following increased utilization of the affordances of the digital. The authors expected that a cross-case comparison would permit the authors to answer to the following research question: Based on the experiences of teachers during the pandemic, how could pre- and in-service teacher education be developed?

Globally, schools and other educational institutions from primary to adult education closed their doors and transferred to remote teaching or favored hybrid teaching (UNESCO, 2021, 2022). The school closures have left an indelible mark and had long-lasting effects on educational systems, students' learning, and teachers' approaches. The greatest disadvantage of remote teaching was that it widened learning gaps between students. According to the UNESCO and Global Education Monitoring Report (2021), the pandemic aggravated educational inequalities by disproportionally affecting the learning possibilities of the most vulnerable groups, including girls, refugees, persons with disabilities, and forcibly displaced persons living in poor or rural areas. While some students seemed to benefit from learning remotely during the lockdowns, others needed face-to-face in-person interaction with their teachers and more robust personal guidance (Korte et al., 2022; UNESCO IBE 2020; UNESCO, 2021). According to the UNESCO Institute for Statistics (UIS) (2021) assessment, by November 2020, children had lost out on 54 percent of their yearly contact teaching time, which means over a year's learning was lost on average. Remote teaching put schools, students, and teachers in an unequal position because some schools and homes, especially those in lower socioeconomic areas, lacked the necessary infrastructure and internet connection to cope with remote learning (UN, 2020). Moreover, teachers were not adequately trained to teach remotely or in a hybrid form, even though the situation varied greatly between and within countries (UNESCO, 2021). Meanwhile, many students lacked the necessary Information and Communication Technology (ICT) skills (UN, 2020).

In addition to the academic implications, the period of remote teaching was detrimental to many students' social and emotional well-being because real-time teaching and interaction with peers and teachers were minimized (UNESCO IUS, 2021). School closures also meant students could not access all health and psychosocial services provided by their schools (UN, 2020). Moreover, in some countries, the provision of free

school lunches was problematic at first and needed new arrangements (UNESCO, 2021, 2022). Since the shift to remote teaching was rapid, this period was stressful for the majority of teaching and guidance staff as well as managers in the education sector (Korte et al., 2022; UNESCO, 2021; 2022). The most drastic change for children during remote teaching was the exponential increase in study time in digital environments, which isolated them from their peers, while families took on activities often handled by schools, such as setting up learning spaces, highlighting the socioeconomic differences between homes (Jæger & Blaabæk, 2020).

Educational sectors worldwide must prepare for possible future global crises, which may be managed by applying the lessons learned from COVID-19. Teacher education should equip teachers not only for society's current demands but also for future needs and challenges they will face in their workplace, including mental health and other societal pressure. This reflects how teaching can be a multifaceted, challenging profession that requires broad expertise developed throughout one's career. As Hattie (2009) stated, the ultimate aim of a teacher's learning process is to develop skills and knowledge that make a difference in the classroom and enhance students' achievement. When the classroom was taken away in 2020, according to numerous studies (e.g., Beardsley et al., 2021; König et al., 2020; Perifanou et al., 2021), there were parallels between instructors' remote teaching experiences around the world. The objective of education is usually to guarantee that all groups of people, regardless of their difficulties, have access to equal educational rights, which is achieved in different ways in different schools and communities (Parmigiani et al., 2020). During pandemic lockdowns, delivering effective education proved particularly challenging (Page et al., 2021). Florian and Camedda (2020) noted that teachers were concerned about their lack of effective preparation for working in diverse classrooms. Many educators faced remote instruction implementation challenges, along with difficulties in promoting learning engagement and motivation during fully remote instruction (Abdel Latif, 2022).

On a positive note, remote instruction improved teachers' proficiency to use digital technologies for teaching (Beardsley et al., 2021) and with positive student learning outcomes (Khoirudin, Ashadi, & Masykuri, 2021). National governments worldwide responded to the situation quickly, providing guidance and support for teachers and students. The crisis led to educational innovations and highlighted the importance of the educational sector, especially teachers' essential role in ensuring the continuity of education during critical times. However, previous research on the COVID-19 scenario mainly focused on a single national context, such as Finland (Korte et al., 2022); comparative approaches examining different pedagogical experiences remain rare. This research is a multiple-case study in which the three case studies are analyzed first independently and then comparatively. We expected that a cross-case comparison would shed light on how pre- and in-service teacher education should be developed based on the teachers' experiences.

The data collection strategies differed in the three countries. In Finland, Satu-Maarit Korte, Minna Körkkö, Miia Hast, Sanna Mommo, Merja Paksuniemi, and Pigga Keskitalo developed and implemented a survey (summer and fall 2020) that provided data on teachers' remote teaching experiences and remote teaching competence during the early phase of the COVID-19 pandemic in northern Finland. In England, Mhairi

Beaton carried out qualitative semi-structured interviews with teachers focusing on children's voices and storytelling in summer 2020. In Norway, Gregor Maxwell conducted qualitative semi-structured interviews with newly qualified teachers in fall 2020. The case-study method enabled us to combine results from three countries and compare them according to the research questions and draw final conclusions (Yin, 2018).

This comparative study contributes to the research on online pedagogy, remote teaching, and teacher education by examining experiences, especially teachers' perceptions and challenges, in three countries in the North European context, during the global pandemic. This contributes to our understanding of the unique crisis the COVID-19 pandemic created for education, which is particularly relevant for designing future teacher education, both pre- and in-service.

Background
Operating Contexts in Finland, England, and Norway
Since the 1970s in Finland, compulsory education reforms have aimed to ensure equal treatment for all children. Nowadays, pre-primary education and compulsory schooling (primary, junior high, and high school) are provided for children and young people aged 6–18 (Oppivelvollisuuslaki 1214/2020). Following basic education, students can choose either vocational or academically oriented upper secondary education, leading to a vocational qualification or matriculation (Finnish National Agency for Education, n.d.). Finnish teacher education is research-based, the objective of which is to develop reflective teachers who take an analytical and critical approach to their work (Toom et al., 2010). All teachers graduate with a master's degree. During the pandemic, children with special educational needs, as well as first- to third-grade pupils of families working in critical professions (such as medical fields), were provided with normal schooling, and after some time, all first to third graders had the choice to attend normal school.

Compulsory education in England consists of one year of pre-primary education, referred to as "reception," followed by six years of primary schooling and four years of secondary schooling. Post-compulsory education consists of a two-year course at a sixth-form college preceding university study or vocational education undertaken at a further education college. However, since 2010 many policy changes have been implemented to reform education, particularly teacher education, as La Velle and Reynolds (2020) have noted. Whiting et al. (2016) described how as a result of this policy churn, there is an almost bewildering number of mostly school-based routes to qualifying as a teacher in the English system. However, Whiting et al. (2019) stated that most student teachers opt for teacher education courses provided by higher education institutes. These are predominantly one-year postgraduate courses to achieve qualified teacher status (QTS). Additionally, some undergraduate programs lead to QTS. During the initial phase of the pandemic, only the children of key workers, including parents working in health services, attended school in person. All other students were expected to attend educational provision virtually. Students' ability to attend school virtually was dependent on the availability of digital devices in their homes, necessitating programs providing laptops to homes in some geographical areas. As the pandemic progressed, the definition of key workers was expanded, but during subsequent lockdowns, teachers

continued to simultaneously provide both in-person and virtual learning options for their students.

Compulsory education in Norway consists of 10 years of primary and lower secondary schooling (grades 1–10). Pre-school (ages 1–5) and upper secondary education (grades 11–13) are optional, but the majority of children undertake both of these (NOKUT, n.d.). The Norwegian Directorate for Education and Training is responsible for supervising the quality of primary and secondary education (NOKUT, n.d.). Norway has a five-year integrated master's degree for all pre-service teachers at the primary and lower secondary school levels (grades 1–10), which was introduced to complement the centralized system that trains teachers for upper secondary education. The new teacher training program was introduced nationally in 2017, with pilots carried out during 2010–2017 in Tromsø and Oslo. Like Finland, Norway aimed to produce research-competent teachers who could work critically and analytically, as well as develop more specialized teachers with further training in specific academic subjects. During the pandemic, there was a temporary change in the education law to accommodate the various restrictions in place. For example, there was the option to allow children who received special education back into schools, regardless of the national policy on homeschooling. However, a large number of children still failed to receive the special education they should have had at the time (Utdanningsnytt, 2022).

Methods
Using a multiple-case study method, this research investigated teachers' experiences during the COVID-19 pandemic in Finland, England, and Norway. In each country, the data was collected during 2020 before writing this case-study article. Thus, each case was independent and focused on different aspects of remote teaching and therefore, methodology differed between cases according to projects' and researches' aims. The Finnish data was collected through an online survey, the English data through semi-structured individual interviews with follow-up group interviews and Norwegian data through semi-structured individual interviews. A case study methodology is an approach that focuses on a contemporary phenomenon in a real-world context (Yin, 2018). In comparison, a multiple-case study design selects cases with common characteristics, seeking to understand the differences and similarities between them (Stake, 2005, 2013). Researchers analyze the data both within a situation and across situations to identify such trends (Stake, 2013; Yin, 2018). The advantages of the multiple-case study designs/approaches are that its use offers evidence from several cases that try to find commonalities and differences, and therefore can spark more broadly about the phenomenon under study; however, multiple-case studies can be expensive and time-consuming (Baxter & Jack, 2008; Eisenhardt & Graebner, 2007).

Each case study answered the following sub-research questions: how was remote teaching perceived by teachers during spring 2020? and what kinds of challenges did teachers face? Through the findings, we answer the overarching research question: how could pre- and in-service teacher education be developed based on the experiences of teachers during the pandemic?

In Finland, the European Social Fund funded project 1 (May–December 2020) provided quantitative and qualitative survey data on 167 teachers' remote teaching experiences

and remote teaching competence during the early phase of the COVID-19 pandemic in northern Finland. In England, the data were drawn from the UK Research and Innovation (UKRI) European and Social Research Council (ESRC)-funded project 2—a collaboration between teachers and researchers in Finland, Canada, and England. The data was collected through 20 qualitative interviews with teachers focusing on children's voices and storytelling. In Norway, qualitative interview data from 31 newly qualified teachers were collected through the ongoing longitudinal project 3, a study that follows the first three cohorts of teachers trained under Norway's newly introduced five-year integrated master's teacher training program.

The sampling methodologies and analysis procedures varied according to each study's purpose in their national contexts. Even if all of them answer the common research questions, we see this as a limitation for our study when the data were not gathered using the same methodological principles. Therefore, for the purpose of the recent paper, the multiple-case study method was used to interrogate the findings from each of the national contexts. The implementation of this kind of methodological and researcher triangulation (Bekhet & Zauszniewski, 2012; Johnson & Christensen, 2020; Flick, 2014, 11–12) can be seen as a factor increasing the reliability of this study, in which the researchers independently familiarized themselves with the survey or interview research material and compared the obtained results. Methodological triangulation is helpful for interpreting results, collating more thorough data, increasing validity, and improving the comprehension of examined phenomena. Yet, there are few published instances it has been employed in the education field (Bekhet & Zauszniewski, 2012). Although the data was collected and analyzed using different methods, in line with Stake (2013), a rigorous comparison of the key findings from different policy and cultural contexts was beneficial for providing insights into the professional learning needs of teachers in a post-pandemic world. However, the comparative value of the different cases was limited since individual case studies were independent and the material was not gathered following identical approaches in the three countries.

All the participants were recruited by emailing information about the research and the voluntary participation invitation. In Northern Lapland, an email was sent to all the principals of schools. The principals then forwarded the message to the teachers of that municipality. The message included a link to a Webropol survey, the objective of the research and the data protection procedure. The teachers gave their consent for research by ticking a relevant box when responding to the survey. In England, all the early years classroom teachers of the chosen two primary schools were invited to participate in an interview. Written information and data protection procedure about the research and a consent form were sent to teachers by the researcher. In Norway, written information about the study and data protection, and a consent form were sent to teachers by the researcher.

The cross-case analysis had two phases. In the first, researchers in the three countries analyzed the results of the case in their respective country according to the teachers' perceptions and challenges. These were the themes that were identified as common across the three different cases through inductive thematic analysis. Then, in the second phase, the findings from the three studies were compared in terms of similarities and differences in the two common themes (teachers' perceptions and challenges). Through

the second phase, the research question "how could pre- and in-service teacher education be developed based on the experiences of teachers during the pandemic?" was answered.

The next section describes the context of each case study, followed by the methodologies, and the phase one findings together with interpretation of themes in each case (Stake, 2013). We then offer the discussion of the cross-case analysis of phase two findings.

Case study 1: Finland
Methodology
The purpose of this study was to investigate teachers' experiences and how they perceived remote teaching during spring 2020. Furthermore, we aimed to understand how their competence allowed teachers to meet the challenges presented by the sudden change. We conducted an online survey in Finnish Lapland of 167 educators from primary, junior high, and high schools regarding their experiences of conducting remote teaching in 2020. The survey containing both open-ended and Likert-scale questions, was sent to all primary school teachers in Lapland via the principals of the schools. The open-ended questions focused on the transition and execution phases of remote teaching, student assessment, positive aspects of remote teaching, and problems encountered. The Likert-scale questions were answered using a five-point scale (0 = not at all, 5 = very much). They were more detailed questions about the transition, planning, and execution phases, technical tools and solutions for remote teaching, success of teaching, stress encountered, and technological pedagogical competence. The sample of respondents represented different age groups and both new and experienced teachers. The findings on teachers' technological pedagogical competence were reported in detail elsewhere (see Korte et al., 2022) and are not included in this paper.

The open-ended responses were analyzed using data-driven thematic analysis (Graneheim & Lundman, 2004; Mayring, 2014). For each open-ended question, the analysis involved coding sentences on different themes and combining those themes when necessary. The quantitative responses were analyzed with SPSS analysis software using logistic regression analysis (Rita et al., 2008). Cross-tabulation, correlation coefficients, and correlation matrices were applied to explore the associations between the various variables in the data, and one-way ANOVA was used to analyze the statistical significance of the mean differences between groups. Regression and factor analyses were employed as multivariate techniques in the analysis.

Key Findings
Teachers' perceptions of remote teaching during spring 2020
The results regarding teachers' remote learning experiences revealed that the workload increased considerably (mean 4.0); however, the teachers felt that remote learning was successful (mean 4.0). According to the teachers, remote learning has some positive effects: certain students benefited from remote learning, and their learning outcomes clearly improved (due to, among other things, the possibility of progressing at their own pace, better concentration, and the removal of social pressure). Moreover, the teachers mentioned positive aspects, such as receiving help and teaching ideas from colleagues, the development of students' and teachers' ICT skills, the facilitation of personalized teaching, and the development of students' self-regulation.

Analysis of correlations between individual remote learning tools and teachers' experiences of success in remote learning showed that smartphones and tablets provided by employers improved the experience of success in remote learning. About 12% of those who used an employer-provided smartphone for remote learning felt that they were successful or highly successful in implementing remote learning, which was higher when compared with those who did not use an employer-provided smartphone. Furthermore, about 20% felt they did well or very well at implementing remote learning, which was again higher when compared with those who did not use an employer-provided tablet. Logistic regression analysis was used to examine the association between individual remote teaching tools and teachers' experiences of success or their workload. The initial analysis revealed that using digital tools provided by one's employer was statistically significantly (p = 0.017) associated with an increase in teachers' experience of work success. Next, all non-significant variables were removed and a new analysis performed. The only device that had a constant effect on the experience of success during remote teaching was a tablet provided by the employer (odds ratio: 5.0). Using a personal or employer-provided desktop was associated with diminished success in remote learning. In fact, when participants used their own desktop computers, this slightly increased the workload experienced (odds ratio: 0.9, p = 0.024).

Challenges faced by teachers during spring 2020

Teachers mentioned several problems with implementing remote learning. For a start, they experienced technical problems due to poor internet connections, students' lack of technological skills, and students' varying access to remote learning tools. They also reported difficulties in reaching and communicating with students, with some absences and dropouts from the online lessons. Teachers also experienced challenges with supporting students' learning, motivation, and self-direction, as well as with individualizing learning.

Teachers wished for more training related to online pedagogy in the planning, implementation, and evaluation of remote learning (e.g., pupils' work, individualization, and activities), as well as training on the use of remote learning software and applications.

Case study 2: England

Methodology

The second case was designed to examine the roles of voice, agency, and narrative as theoretical concepts in early years education settings. Two primary schools in Yorkshire, Northern England known for their provision of high-quality education were chosen as data collection sites. A qualitative, ethnographic, co-participatory approach was adopted for data collection and analysis throughout the project, facilitating an understanding of the diverse experiences of individual teachers (Clarke et al., 1996). It has been noted that differences in professional cultures between classroom teachers and academic researchers can cause miscommunication; therefore, it was proposed that adopting this ethnographic, co-participatory methodology would ensure a highly productive relationship between participants and the research team (Ebbutt et al., 2000).

The first phase of the project was a baseline audit consisting of semi-structured interviews with 20 early years practitioners (Evans, 2018). All staff in the early years classrooms in the two focus schools were individually interviewed, with the interviews lasting between 30 and 45 minutes. Conducted in July 2020, the focus of the interviews was on teachers' experiences of teaching and learning when they were physically separated from most of their pupils for several months. All interviews were conducted and recorded, subsequently transcribed and thematically analyzed (Miles et al., 2018). Emergent themes included professional uncertainty, ethics of professional care, embracing new opportunities, digital poverty, the challenges of hybrid teaching, and the need for professional learning.

Key Findings
Teachers' perceptions of remote teaching during spring 2020
When the teachers articulated their experiences of the rapid shift to online learning, this proved to be an emotive subject. The staff interviewed represented a wide range of career stages and experiences as early years practitioners. Yet, as professionals working in schools known for providing high-quality education, they were used to exhibiting high levels of professional competence and confidence in their work. The teachers spoke movingly about how unsettling it was to suddenly embrace new ways of providing learning opportunities for their students.

These feelings of uncertainty were exacerbated by wider concerns about the health and well-being of young people during the global pandemic. Both schools maintained excellent pastoral care for their students; to do so, in the first few weeks of the pandemic, during the initial school shutdown, school staff in England focused more on the welfare of their students than on the provision of online learning, in line with many of the studies in Owens' and Ennis's meta-analysis (2005). Contact between staff and students took the form of "checking in" with each other rather than making informed moves to advance the learning of students. During this time, the possibilities in the digital sphere were explored (König et al., 2020).

The teachers also mentioned that the new teaching situation provided benefits. All staff valued the opportunity to hold one-to-one sessions online with students, considering this quality time with individual students in their home environment beneficial. For these students, speaking with their teachers about their safety seemed to provide a comfortable environment that allowed them to participate more fully than they did in the classroom. This aligns with the findings of Beaton et al. (2021a), who found that for many students with disabilities, particularly those with autism, the online learning environment during the pandemic was viewed as a safe and effective space for learning.

As they became more confident in their use of technology to provide learning opportunities for students, the teachers recognized the opportunities this situation offered for exploring new pedagogies (Chauhan, 2017). One teacher spoke enthusiastically about encouraging individual students and their families to lead some of the learning from their home, such as one student and her mother who demonstrated making crepes in French. Several of the teachers spoke about online learning having initially been challenging, but once they began to experiment with the affordances of the medium, they enjoyed the freedom it provided to try new ways of working.

Teachers' perceptions of remote teaching during spring 2020
One major challenge highlighted by the teachers was the lack of digital devices for some of their pupils. In areas of high economic deprivation, some pupils had access to only a mobile phone rather than a laptop or tablet, which was often shared with siblings. This is an ongoing issue in areas of high deprivation (Rallet & Rochelandet, 2007). For some pupils, access to a mobile phone was also challenging due to the high cost of data usage.

In addition, teachers expressed concern about the competence of some parents to facilitate home learning, particularly those who did not speak English as a first language. Yet, over time, many of these issues were addressed with the support of older siblings or other family members.

A concern that remained throughout the pandemic was the challenge of hybrid teaching since the children of "key workers" attended face-to-face in their classrooms while most students were taught remotely in their homes.

The data analysis indicated that the pandemic required teachers to be adept at using new technology and familiar with the affordances of digital provision within education (Chauhan, 2017). The teachers articulated that the sudden move to online learning shook their professional confidence in their ability to provide meaningful and effective learning for their students. Although they rose to the challenge and rapidly developed their ability to work with the available hardware and software, two of the teachers noted that developments in technology moved rapidly, and it was challenging for teachers to keep abreast of new developments.

The analysis also highlighted the need for teachers to be aware of the values that underpin their practice. A key theme arising from the data analysis was the underpinning ethic of professional care for others, which informed the decisions the teachers made (König et al., 2020). Although the provision of online learning was not necessarily of a high standard immediately after the lockdown commenced, each of the teachers noted that their professional priority was to make the best choices for their students, despite the adverse social context.

The novel situation created by the pandemic demonstrated a need for teachers to determine their own professional learning needs and for teachers to be trusted to make independent pedagogical choices as circumstances changed, similar to the proposals made by Beaton et al. (2021b).

Case study 3: Norway
Methodology
To compare the new teacher training program's aims and objectives with its practical outcomes, recent newly qualified teachers (NQTs) from UiT The Arctic University of Norway (UiT) were surveyed and interviewed at various time points to create a longitudinal study. Data were analyzed using thematic analysis (Braun & Clarke, 2006). Individual interviews were held over three years (2015–2017) with around 30 graduating students of both genders a few days after they submitted their master's theses, and then they were interviewed again after one, two, three, and five years in service. Due to the

global pandemic, only the interviews after four and five years of service were included in the analysis presented here. These included 31 teachers after retention losses were accounted for: 14 teachers from the first cohort, 6 from the second, and 11 from the third. An open-ended, semi-structured interview guide (Kvale, 2008) was adapted for each year of data collection to capture changes in the students' experiences regarding their work as NQTs. Each interview lasted 45–60 minutes and was recorded and transcribed.

The analysis was intended to capture the perceived realities of the NQTs as the pandemic unfolded. First, the data were interpreted inductively by grouping all similar thematic statements using broad bucket coding in NVivo 12 (Bazeley, 2007). To determine overarching themes, the process included coding whole sentences and sequences based on their content. Process memos were used to write down the researchers' reflections and generate ideas for categorizing the data (Maxwell, 2012). After the initial bucket coding, similar codes were merged and some were deleted.

The included codes were drawn from frequently used statements concerning the actions and processes informants found important. Whiteboards were used as a creative visual tool to identify and qualify the explanatory relationships between the categories (Maxwell, 2012). Informants' experiences were summarized in a table to visualize similarities and differences, and the codes were connected to the theoretical framework to gain a deep understanding of the NQTs' experiences.

Key Findings
Teachers' perceptions of remote teaching during spring 2020
Norwegian teachers generally approached the challenge of suddenly moving to remote online teaching with trepidation. Some raised concerns about the increased workload and uncertainty around technology use. There was also great concern about pupils' welfare. Teachers specifically raised concerns about the difficulties that some children faced in reaching all the main curriculum outcomes/goals/learning outcomes. Some teachers were resigned to the likelihood that not all children would achieve the goals and believed that their general welfare was more important.

On the upside, one teacher noted that because the pandemic required them to think differently while teaching online, their teaching became more varied. Some also reported being inspired to use more digital resources when they eventually returned to the classroom. One teacher reported a positive outcome of the pandemic lockdowns: they had developed better and closer relationships with their pupils due to working more intensively with them in digital environments. In addition to the new form of lesson delivery, the onset of the pandemic also required that teachers worked together in new ways. Some of the Norwegian teachers reported improvements in collaboration and support from colleagues, fostered by working online.

Challenges faced by teachers during spring 2020
Several teachers felt proud to be considered "essential workers," and the pandemic raised the general public's awareness of and respect for teachers. Nevertheless, increased workloads, lack of technological equipment, and concerns about students' educational outcomes were all cited as challenges.

Furthermore, changes to regular teaching activities meant that previously planned classes and field trips had to be completely reorganized or canceled. Specific concerns about information technology equipment were raised regarding pupils' and teachers' access to high-quality, functional, and up-to-date equipment. Previously, they had managed with older equipment that could be shared and spread over several classes, but it quickly became apparent that more and newer equipment was needed.

Challenges were encountered, too, with delivering adapted and special education effectively. Specific issues related to how pupils who normally had classroom assistance would maintain their education. Teachers complained that it was burdensome for the main class teacher to take on extra individual-focused teaching since classroom assistants were effectively absent from online/distance education settings. One teacher, however, suggested that it was actually beneficial for general working collaboration since the pandemic meant there were fewer assistants involved in some pupils' education.

Several teachers said they considered leaving the profession during the lockdown period; however, to our knowledge, none of those who mentioned this followed through and left (though the reasons for some participants' dropout from the project were difficult to verify).

While teachers generally believed they delivered good-quality education during the lockdowns, they also raised concerns about a lack of resources and feeling underprepared. Norwegian teachers expressed a need for greater digital competence and called for fresh education on technology and how to use it, along with improved information on technology-based equipment.

Discussion
Differences and similarities of the findings from the case studies
Our comparison of the three case studies' findings indicates there were both similarities and differences in teachers' experiences in the three countries. Remote teaching was an unexpected development for teachers that placed new demands on their competencies, and in different ways, it was viewed both positively and negatively by teachers. This comparative multiple-case study has examined teachers' experiences, especially their perceptions and challenges, in three countries during the COVID-19 pandemic to determine which areas should be developed in pre- and in-service teacher education based on teachers' experiences. Teachers' perceptions and challenges were divided in five sub-themes that emerged from the comparison of the data in the three countries: 1) teacher-student relations, 2) teachers' competence, 3) teachers and surrounding society, 4) students' competence, and 5) technology.

In teacher-student relations we looked at teachers' experiences regarding their relationship with the students individually and as a group, how they communicated and what kind of concerns teachers had for their students. Particularly challenging for teachers was supporting students' individualized learning, as mentioned by Finnish and Norwegian teachers. However, in Norway the teachers felt closer relationships with students than they had in the classroom as they could give them more intensive attention during online meetings.

In the three countries teachers were concerned about the well-being of students. In Finland, teachers worried more about students who were absent from online lessons. Reaching students during the pandemic proved more difficult in some cases than in face-to-face teaching (Ahtiainen et al., 2020). For such reasons, the Norwegian and English teachers voiced concerns about whether certain students would achieve the main learning outcomes. So, remote teaching seemed to considerably affect teacher–student relationships.

In teachers' competence we analyzed aspects regarding teachers' professional know-how. In the three settings, the teachers reported feeling underprepared, which the English and Norwegian teachers described as having shaken their professional confidence. Similarly, previous studies reported teachers' challenges with pedagogy during the pandemic (e.g., Beardsley et al., 2021; Jaenudin et al., 2021; Perifanou et al., 2021). All teachers wished for additional training on using educational technology and online pedagogy. Teachers reported some common positive experiences related to their improved proficiency in using digital technologies and new and diverse pedagogies, which is in line with the study by Beardsley et al. (2021). Similarly, Ahtiainen and colleagues (2020) found that teachers' digital skills improved during remote teaching and learning.

Regarding teachers and the surrounding society, we concentrated on anything that mentioned teachers outside of their own classroom and student context. Teachers from the three countries reported that communication and collaboration between other teachers improved during the remote teaching. Norwegian teachers reported having experienced the increase in teachers' professional appreciation because of the Covid-19, while English teachers raised concerns about students' parents' ability to facilitate home learning.

Students' competence encompasses the teachers' views on any given skills of the students. The teachers in Finland and England found that remote teaching increased students' ICT skills. The Finnish teachers also mentioned that students' self-regulation skills increased. However, the Finnish teachers also raised concerns about students' lack of digital skills.

The aspect of technology refers to the teachers' experiences regarding the use of technology. Teachers in all three countries experienced technical problems while teaching remotely, especially relating to a poor internet connection, lack of devices, and lack of high-quality functional equipment for teachers and students. In this way, our findings corroborate the results of previous studies (Ahtiainen et al., 2020; Beardsley et al., 2021). According to previous studies (e.g., König et al., 2020), school-provided technology positively affects teachers' success in mastering the challenges of online teaching. The Finnish case study confirmed and widened this notion by suggesting that technological devices provided by employers could decrease teachers' workloads during the COVID-19 crisis. Finnish and Norwegian teachers found that their workloads increased with remote teaching and learning. Yet, the findings of the Finnish case study indicate that the use of an employer-provided desktop is statistically significantly associated with a reduction in workload, whereas the use of a teacher's personal desktop

is statistically significantly associated with a perceived increase in workload. Moreover, the results suggest that tablet computers provided by employers correlate statistically significantly with teachers' success in organizing remote learning. However, these findings concern only the Finnish case study so generalizations should be made with caution. Alongside technology provision, many other factors are related to teachers' workload and success in remote teaching, such as support from colleagues and students' access to devices, which are aspects that were not examined in this study. Besides challenges, the Finnish and English teachers stated that the online environment was a safe and effective space for their students to learn.

Findings of the teachers' perceptions and challenges on the remote teaching situation are widely applicable since teachers in different parts of the world had similar experiences, facing many of the same benefits and obstacles concerning remote teaching (UNESCO, 2020). However, as policy reports emphasize, there were many contextual differences between countries and areas concerning their preparedness for a crisis and their ways of organizing the period of remote and hybrid teaching, reflecting different socioeconomic and cultural circumstances (UNESCO and Global Education Monitoring Report, 2021). There can be substantial differences within a country and even between schools (UNESCO, 2020). This was seen in the English case study, which revealed that pupils particularly lacked sufficient technological devices in areas of economic deprivation, with the digital divide exacerbated during school closures (UNESCO International Bureau of Education, 2020; UN, 2020).

We presume that similarities noted between the three case studies derived from the relatively similar educational systems in the three northern European countries and their high levels of digitization. Differences between the three case studies' findings, meanwhile, can be seen to have arisen from their contextual variations, along with aspects we did not study or consider in this study. Teachers in the three countries worked at several schools with different technological and pedagogical preparedness, which was also not measured in this comparative study. In addition, although the three respective countries have high digitization, the schools also applied different rates and levels of digitization during the lockdowns (UNESCO, 2022). Overall, teachers' technological pedagogical competence varied, which affected their experiences of remote teaching between and within the three countries.

Implications for Pre- and In-Service Teacher Education
International policy reports highlight the need to increase teachers' readiness for crisis situations and strengthen their competence in remote and hybrid teaching (UNESCO, 2021; UN, 2020). This study sheds light on how school closures and a period of remote teaching affected teachers' instruction. From the results, it is possible to identify certain implications for pre- and in-service teacher education, which may be developed to better prepare teachers to lead their students' learning today and in the future.

First, curriculum attention should be drawn to technological, pedagogical, and psychological aspects of schooling, to ensure teachers' better preparedness for changing learning environments and possible crisis situations. Regarding technological and pedagogical aspects, future teachers would benefit from learning the pedagogical uses of multiple digital learning environments and video meeting tools, which in normal times,

can be beneficially utilized in their face-to-face contact teaching and daily teacher work. Remote and hybrid teaching could also be applied and practiced during different phases of initial teacher education. Since faculty collaboration and support are essential to successful remote teaching, it will also be useful for student teachers to apply collaborative learning approaches in teaching practice. Moreover, regarding psychological aspects of the profession, students', families' and teachers' well-being should be addressed, with training on how to support such well-being, as well as recognize the effects of unexpected and exceptional times (e.g., school closures) on well-being. Teachers already in the field would benefit from tailored professional development possibilities on the above-mentioned topics. Those teachers who experienced school lockdowns during 2020 could act as experts whose knowledge can be used to help develop both student teachers' education and qualified teachers' professional learning.

Conclusion
This article presents a multiple-case study conducted in Finland, England, and Norway, presenting situations in northern educational contexts in the respective countries. Findings from these case studies are generally not valid for wide contexts and organizations. To overcome that, a strength of this study is its comparative approach as the findings are drawn from slightly different settings that complement one another. Furthermore, although the results reported here originated from a relatively small number of informants, our detailed description of the specific cases enables the findings to transcend their original contexts and contributes to how we can understand similar social contexts (Hellström, 2008). Both qualitative and quantitative analyses produced knowledge of teachers' perceptions and challenges they encountered. Through the quantitative analysis of the Finnish case, it was possible to gain a more nuanced picture, for instance, of the support that teachers received with remote teaching, the technological tools they applied, and their workload. At the same time, the findings from England voice the teachers' concern about the parents' abilities to facilitate learning at home, while the Norwegian teachers mention their concerns about not being able to achieve the curriculum learning goals.

In future studies, it would be beneficial to compare findings from a wider range of countries and contexts concerning teachers', students', and guardians' experiences. It would also be interesting to examine what kinds of influences cultural, locational, and educational contexts have on the findings. Furthermore, empirical studies could identify and investigate which of future teachers' competencies and practices are linked with the technological, pedagogical, and psychological aspects of schooling in the future.

The COVID-19 pandemic impacted education provision globally and sped up a process of increasing digitization, which was underway before the pandemic. However, the speed of the transition was an issue because it did not allow teachers to prepare for new ways of working. In this study, we investigated what could be learned from remote teaching experiences during the pandemic and how we can evaluate and develop teachers' education in a post-pandemic world. The findings suggest that teachers wish for additional education on online pedagogies and the practical and pedagogical use of technologies. Furthermore, we highly recommend future teachers engage in activities that support group dynamics and team building with colleagues, to enhance and

improve collaboration and the work atmosphere so that greater ideas and thoughts are shared.

Ph. D. Satu-Maarit Korte *(University of Lapland, Finland), is a senior lecturer in media education. Her key research interests are technology-mediated learning, media and psychosocial well-being, and neural foundations of learning.*

Ph. D. Minna Körkkö *(University of Oulu, Finland) is postdoctoral researcher. Her research interests include teacher professional development and teacher competence as well as student teachers' reflection. Especially, she is interested in using a video and other technologies as tools in teachers' and students' learning and competence development.*

Ph. D. Outi Kyrö-Ämmälä *(University of Lapland, Finland), is a university lecturer in teacher education. She is also a Vice Dean responsible for teaching at the Faculty of Education. Her key research interests are inclusive education, inclusive teacher education and pupils' cognitive skills.*

Ph.D. Miia Hast Miia *(University of Lapland, Finland), is a university lecturer in craft education. His main research areas are craft technology, learning analytics in skill and art subjects, digital pedagogy, and artificial intelligence in teaching and learning.*

Lic. Sanna Mommo *is a university teacher of craft education at the Teacher Training Institute of the University of Lapland, Finland. Her teaching focuses on the didactics of both textile work and multi-material handicraft. Her researcher research focuses on the pedagogical implementation models of multi-material crafts, the cultural significance of crafts and materiality.*

Ph.D. Merja Paksuniemi (*University of Lapland, Finland), is a university researcher at the Faculty of Education. Her key research interests are teacher education, wellbeing and education, and ideologies and social contexts of education.*

Ph. D. Gregor Maxwell *(UiT The Arctic University of Norway) is an associate professor in inclusive and special education. His research interests are inclusion and participation for marginalized children and teachers' inclusive and special education competences.*

Professor Mhairi C Beaton *is a professor at Carnegie School of Education, Leeds Beckett University in the UK. Mhairi's research interest lies at the interface of teacher education, inclusion and student voice.*

Professor Pigga Keskitalo *(University of Lapland, Finland) is a professor in education, specifically in Arctic perspectives in education. Her research interests are Indigenous education and Indigenous research methods in various diverse educational contexts, more specifically Sami education and research.*

References

Abdel Latif, M. M. (2022). Coping with COVID-19-related online English teaching challenges: Teacher educators' suggestions. *ELT Journal*, *76*(1), 20–33. https://doi.org/10.1093/elt/ccab074

Ahtiainen, R., Asikainen, M., Heikonen, L., Hienonen, N., Hotulainen, R., Lindfors, P., Lindgren, E., Lintuvuori, M., Oinas, S., Rimpelä, A., & Vainikainen, M.-P. (2020). Koulunkäynti, opetus ja hyvinvointi kouluyhteisössä korona epidemia aikana: Ensitulokset [Schooling, teaching and welfare in the school context during the corona epidemic: First results]. Helsingin yliopisto: Koulutuksen arviointikeskus HEA [University of Helsinki: Centre for Educational Assessment (CEA)], Tampereen yliopisto. Lasten ja nuorten terveyden edistämisen tutkimusryhmä NEDIS [University of Tampere, Research on Children's and Adolescents' Health Promotion (NEDIS)], Koulutuksen, arvioinnin ja oppimisen tutkimusryhmä REAL [Research Group for Education, Assessment and Learning (REAL)].

Baxter, P., & Jack, S. (2008). Qualitative case study methodology: Study design and implementation for novice researchers. *The Qualitative Report*, *13*(4), 544–556.

Bazeley, P. (2007). *Qualitative data analysis with NVivo*. SAGE Publications.

Beardsley, M., Aragón, P., & Hernández-Leo, D. (2021). Emergency education effects on teacher abilities and motivation to use digital technologies. *British Journal of Educational Technology*, *52*(4), 1455–1477. https://doi.org/10.1111/bjet.13101

Beaton M. C., Codina G. N., & Wharton J. C. (2021a). Decommissioning normal: COVID-19 as a disruptor of school norms for young people with learning disabilities. *British Journal of Learning Disabilities*, *49*(4), 393–402. https://doi.org/10.1111/bld.12399

Beaton, M. C., Thomson, S., Cornelius, S., Lofthouse, R., Kools, Q., & Huber, S. (2021b). Conceptualising teacher education for inclusion: Lessons for the professional learning of educators from transnational and cross-sector perspectives. *Sustainability*, *13*, 2167. https://doi.org/10.3390/su13042167

Bekhet A. K., & Zauszniewski J. A. (2012). Methodological triangulation: An approach to understanding data. *Nurse Researcher*, *20*(2), 40–43. https://doi.org/10.7748/nr2012.11.20.2.40.c9442

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, *3*(2), 77–101. https://doi.org/10.1191/1478088706qp063oa

Chauhan, S. (2017). A meta-analysis of the impact of technology on learning effectiveness of elementary students. *Computers & Education*, *105*, 14–30. https://doi.org/10.1016/j.compedu.2016.11.005

Clark, C., Moss, P. A., Goering, S., Herter, R. J., Lamar, B., Leonard, D., Robbins, S., Russell, M., Templin, M., & Wascha, K. (1996). Collaboration as dialogue: Teachers and researchers engaged in conversation and professional development. *American Educational Research Journal*, *33*(1), 193–231. https://doi.org/10.3102/00028312033001193

Cohen, L., Manion, L., & Morrison, K. (2011). *Research methods in education* (7th ed.). Routledge.

Ebbutt, D., Worrall, N., & Robson, R. (2000). Educational research partnership: Differences and tensions at the interface between the professional cultures of practitioners in schools and researchers in higher education. *Teacher Development*, *4*(3), 319–338. https://doi.org/10.1080/13664530000200129

Eisenhardt, K. M., & Graebner, M. E. (2007). Theory building from cases: Opportunities and challenges. *The Academy of Management Journal*, *50*(1), 25–32. https://doi.org/10.5465/amj.2007.24160888

Evans, C. (2018). *Analysing semi-structured interviews using thematic analysis: Exploring voluntary civic participation among adults*. SAGE Research Methods Datasets.

Finnish Education System. (n.d.) *The Finnish education system*. Finnish National Agency for Education. https://www.oph.fi/en/education-system

Flick, U. (Ed.). (2014). *The SAGE handbook of qualitative data analysis*. SAGE Publications.

Florian, L., & Camedda, D. (2020). Enhancing teacher education for inclusion. *European Journal of Teacher Education*, *43*(1), 4–8. https://doi.org/10.1080/02619768.2020.1707579

Graneheim, U. H., & Lundman, B. (2004). Qualitative content analysis in nursing research: Concepts, procedures and measures to achieve trustworthiness. *Nurse Education Today*, *24*(2), 105–112. https://doi.org/10.1016/j.nedt.2003.10.001

Hattie, J. (2009). *Visible learning: A synthesis of 800+ meta-analyses on achievement*. Routledge.

Hellström, T. (2008). Transferability and naturalistic generalization: New generalizability concepts for social science or old wine in new bottles? *Quality & Quantity*, *42*(3), 321–337. https://doi.org/10.1007/s11135-006-9048-0

Jæger, M. M., & Blaabæk, E. H. (2020). Inequality in learning opportunities during COVID-19: Evidence from library takeout. *Research in Social Stratification and Mobility*, *68*, 100524. https://doi.org/10.1016/j.rssm.2020.100524

Jaenudin, A., Pitaloka, L. K., & Melati, I. S. (2021). Digital literation as a teacher solution in learning the digital era and pandemic COVID-19. *Economic Education Analysis Journal*, *10*(1), 1–11. https://doi.org/10.15294/eeaj.v10i1.44566

Johnson, R. B., & Christensen, H. (2020). *Educational research: Quantitative, qualitative and mixed approaches*. SAGE Publications.

Khoirudin, R., Ashadi, A., & Masykuri, M. (2021). Smart Apps Creator 3 to improve student learning outcomes during the pandemic of COVID-19. *JPBI (Jurnal Pendidikan Biologi Indonesia)*, *7*(1), 25–34. https://doi.org/10.22219/jpbi.v7i1.13993

Korte, S.-M., Körkkö, M., Paksuniemi, M., Hast, M., Sanna, M., & Keskitalo, P. (2022). Experiences of remote teaching, technological pedagogical competencies and workload of teachers in northern Finland during the COVID-19 pandemic. *Education in the North*, *29*(2), 68–93. https://doi.org/10.26203/p6gp-9729

Kvale, S. (2008). *Doing interviews*. SAGE Publications.

La Velle, L., & Reynolds, K. (2020). Reframing the professionalism of teachers. In B. Hudson, M. Leas, & S. Younie (Eds.), *Education system design: Foundations, policy options and consequences* (pp. 208–219). Routledge.

Maxwell, J. A. (2012). *Qualitative research design: An interactive approach* (Vol. 41). SAGE Publications.

Mayring, P. (2014). *Qualitative content analysis: Theoretical foundation, basic procedures and software solution*. Social Science Open Access Repository. https://www.ssoar.info/ssoar/handle/document/39517

Miles, M. B., Huberman, A. M., & Saldana, J. (2018) *Qualitative data analysis: A methods sourcebook*. SAGE Publications.

NOKUT, General information about education in Norway https://www.nokut.no/en/norwegian-education/general-information-about-education-in-norway/

Oppivelvollisuuslaki 1214/2020 (Compulsory Education Act 1214/2020). [Oppivelvollisuuslaki 1214/2020 - Säädökset alkuperäisinä - FINLEX ®](#)

Owens, L. M., & Ennis, C. D. (2005) The ethic of care in teaching: An overview of supportive literature, *Quest*, *57*(4) 392–425. https://doi.org/10.1080/00336297.2005.10491864

Page, A., Charteris, J., Anderson, J., & Boyle, C. (2021). Fostering school connectedness online for students with diverse learning needs: Inclusive education in Australia during the COVID-19 pandemic. *European Journal of Special Needs Education*, *36*(1), 142–156. https://doi.org/10.1080/08856257.2021.1872842

Parmigiani, D., Benigno, V., Giusto, M., Silvaggio, C., & Sperandio, S. (2020). E-inclusion: Online special education in Italy during the COVID-19 pandemic. *Technology, Pedagogy and Education,* 30(1), 111–124. https://doi.org/10.1080/1475939X.2020.1856714

Perifanou, M., Economides, A. A., & Tzafilkou, K. (2021). Teachers' digital skills readiness during COVID-19 pandemic. *International Journal of Emerging Technologies in Learning (iJET)*, *16*(8), 238–251. https://doi.org/10.3991/ijet.v16i08.21011

Rallet, A., & Rachelandet, F. (2007). ICTs and inequalities: The digital divide. In N. Brousseau, & N. Curien (Eds.), *Internet and digital economics* (pp. 693–717). Cambridge University Press. https://doi.org/10.1017/CB09780511493201.025

Rita, H., Töttö, P., & Alastalo, M. (2008). Voiko turkulaisten kirjoittamista artikkeleista yli 100% olla kvantitatiivisia? Vetosuhteen (odds ratio) ja vedon (odds) tulkintaa. [Can more than 100% of the articles by people from Turku be quantitative? Interpretation of odds ratios]. *Janus Sosiaalipolitiikan ja sosiaalityön tutkimuksen aikakauslehti*, *16*(1), 72–80.

Stake, R. E. (2005). Qualitative case studies. In N. K. Denzin, & Y. S. Lincoln (Eds.), *The SAGE handbook of qualitative research* (3rd ed., pp. 433–466). SAGE Publications.

Stake, R. E. (2013). *Multiple case study analysis.* Guilford Press.

Toom, A., Kynäslahti, H., Krokfors, L., Jyrhämä, R., Byman, R., Stenberg, K., Maaranen, K., & Kansanen. P. (2010). Experiences of a research-based approach to teacher education: Suggestions for future policies. *European Journal of Education*, *45*(2), 331–344. https://doi.org/10.1111/j.1465-3435.2010.01432.x

UNESCO. (2021). *Recovering lost learning: What can be done quickly and at scale?* https://unesdoc.unesco.org/ark:/48223/pf0000377841/PDF/377841eng.pdf.multi

UNESCO. (2022). *National distance learning programs in response to the COVID-19 education disruption: Case study of Finland.* https://unesdoc.unesco.org/ark:/48223/pf0000382447/PDF/382447eng.pdf.multi

UNESCO and Global Education Monitoring Report. (2021). *Keeping girls in the picture during and after the COVID-19 crisis: The latest facts on gender equality in education.* https://unesdoc.unesco.org/ark:/48223/pf0000375707

UNESCO International Bureau of Education. (2020). *Some implications of COVID-19 for remote learning and the future of schooling.* https://unesdoc.unesco.org/ark:/48223/pf0000373229/PDF/373229eng.pdf.multi

The UNESCO Institute for Statistics. (2021). *Pandemic-related disruptions to schooling and impacts on learning proficiency indicators: A focus on the early grades.* https://unesdoc.unesco.org/ark:/48223/pf0000377781/PDF/377781eng.pdf.multi

United Nations. (2020). *Policy brief: Education during COVID-19 and beyond.* https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/08/sg_policy_brief_covid-19_and_education_august_2020.pdf

Whiting, C. (2019). Towards a new topography of ITT: A profile of initial teacher training in England, 2015–16. In N. Sorensen (Ed.), *Diversity in teacher education: Perspectives on a school-led system* (p. 29–59). UCL IOE.

Whiting, C., Black, P., Hordern, J., Parfitt, A., Reynolds, K., Sorensen, N., & Whitty. G. (2016). *Towards a new topography of ITT: A profile of initial teacher training in England, 2015–16.* Bath Spa University Institute for Education.

Yin, R. K. (2018). *Case study research and applications: Design and methods* (6th ed.). SAGE Publications.

Primary school learning in sub-Saharan Africa during COVID-19: a scoping review of responses and recovery initiatives induced

Dr. Brenda Wawire
African Population and Health Research Center

Dr. Adrienne Barnes-Story
Florida State University

Dr. Elisheba Kiru
African Population and Health Research Center

Sungkyum Kim
Florida State University

Globally, the COVID-19 pandemic caused unprecedented disruptions in education. School closures quickly followed the onset of the pandemic to contain the spread of the virus, forcing millions of students out of their regular academic calendars. Countries put in place interventions aimed to reduce the deleterious effects of school closures and disruptions in learning. For instance, many countries used various mediums to provide students with distance learning. This scoping review examines the interventions that education systems in low- and middle-income Sub-Saharan African (SSA) countries (LMIC) implemented to mitigate learning loss in reading and writing skills among early grade learners (i.e., children attending primary schools) and discusses the reach of those programs. This review highlights the proportion of students reached by the targeted mitigation measures, revealing that LMIC countries in SSA provided students with remote learning opportunities through radio and television programming, provided teachers with professional development on the use of novel tools, and provided parents and families with support to help learners at home. However, these disruptions affected the traditional assessment methods. Various assessment methods were implemented to measure student progress, but there is a need for appropriate progress monitoring tools and accurate data to measure the effectiveness of the interventions. Many LMIC implemented Return-to-School policy frameworks, processes, and principles that ensured safe learning continuity.

Keywords: learning loss, COVID-19, interventions, responses, literacy, early grades

Primary school learning in sub-Saharan Africa during COVID-19: a scoping review of responses and recovery initiatives induced during school closures

The early years of education represent a critical period during which children acquire a range of core competencies correlated with reading comprehension, literacy achievements, and academic outcomes (Shanahan & Lonigan, 2010). Providing all early grade learners with a strong literacy foundation is vital for reaching Sustainable Development Goal 4, which focuses on ensuring inclusive and equitable high-quality education and promoting lifelong learning opportunities (United Nations, 2015). In the early phases of reading development, children acquire code-focused skills such as letter knowledge, phonics, and word recognition - all of which are instrumental in developing text reading fluency and comprehension skills (Foorman et al., 2020; Petscher et al., 2020). Foundational literacy is a building block for education attainment and civic engagement in the 21st century. Some skills that contribute to literacy acquisition, specifically those that are not code-focused (oral language and vocabulary knowledge), begin to develop before children enter school. Code-focused skills are efficiently acquired through explicit, systematic instruction (Archer & Hughes, 2011). Code-focused intervention is critical for both monolingual and bilingual children from low- and middle-income country (LMIC) contexts such as many sub-Saharan African (SSA) countries (August & Shanahan, 2006; Kim et al., 2020). In these contexts, foundational literacy skills learning has been predominantly limited to school settings where students and teachers interact as a whole class, or where learners work in small groups.

Mass school closures caused by the COVID-19 pandemic disrupted the education of more than 1.6 billion children globally (World Bank, 2020), with particularly large impacts on education systems and Ministries of General Education [MOGE] in developing country contexts. In SSA, more than 127 million vulnerable school-going children were forced out of classrooms (UNESCO, 2021a). The present study focuses on Sub-Saharan African LMICs, based on the World Bank classifications. We included data available at the time of publication for all countries on the African continent excluding South Africa, Egypt, and Morocco. School shutdowns exacerbated the dismal pre-pandemic learning poverty levels in the region, wherein the percent of students who were unable to read and understand simple texts by age ten already stood at 87% and is currently at 89% (World Bank, 2021). Prior to the pandemic, SSA faced persistent challenges in the education sector related to large class sizes, deficiencies in teachers' content and pedagogical content knowledge, poor pedagogical approaches, lack of home literacy support, inadequate teacher training and professional development (PD), inadequate supplies of teaching and learning materials, learning in unfamiliar instructional languages, and high rates of teacher and student absenteeism (Uwezo, 2016). An in-depth examination of interventions that might mitigate learning loss for students living in low-resource contexts of SSA is crucial, given the learning lag that existed before the pandemic. Considering the current and long-term impact of learning loss on literacy development, this scoping review analyzes evidence on the instructional and policy interventions implemented in SSA LMICs to mitigate learning loss among early grade readers (Joanna Briggs Institute, 2015). The findings provide examples from which low-resource countries around the globe can draw lessons as they build back resilient education systems and recover from the detrimental effects of COVID-19.

The Present Study

This paper provides a review of the available evidence on policy responses and interventions that SSA LMIC countries implemented during and after COVID-19 school closures to reduce and compensate for the loss of literacy skills for early grade learners (i.e., children attending primary school). In order to ensure future pandemic preparedness and to make SSA education systems resilient and better prepared to ensure learning continuity and access to education for the vulnerable populations, it is critical to review the available literature that sheds light on mitigation measures, their reach, response, and recovery mechanisms. The present study addresses the following research questions:

(1) What interventions were taken by governments and various education stakeholders across Sub-Saharan Africa LMICs to support primary literacy skill development during and after COVID-19 school shutdowns?
(2) What was the reach of these interventions?

Rationale for the Study

Given the risk of children being left behind in education, it is critical to document the intervention and mitigation measures implemented in various SSA LMIC countries to ensure learning continuity among vulnerable early grade children who are at risk of being left further behind. The evidence generated from the current review can inform policy frameworks that can be tested, validated, adapted for institutionalization by governments and Ministries of General Education as part of efforts to ensure future pandemic preparedness and promote access to education and learning continuity. In addition, the lessons of effective and ineffective intervention implementation can be adapted to strengthen education systems, curbing the loss of foundational literacy skills.

Global Mitigation of Learning Loss

Learning loss is the deterioration of learned skills and missed learning opportunities that students would have benefitted from without interruptions to schooling (Angrist et al., 2021; Slade et al., 2017). The Organization for Economic Co-operation and Development (OECD) and Harvard Graduate School of Education's (2020) survey of 98 countries reveals salient education challenges in mitigating learning loss during COVID-19 converge to, among others: (1) ensuring the continuity of academic learning; (2) supporting students who lack skills for independent or online study; (3) ensuring continuity and integrity of the learning assessments; and (4) defining new priorities. Against this backdrop, various forms of remote learning solutions have been implemented worldwide –for both instruction and assessment. In Brazil, daily educational video broadcasting on state television was initiated following the National Council of Education's recommendation to make families the direct audience or early childhood education content (Piedra & Reimers, 2020). This augmented the

distribution of free digital children's books targeted for low-educational-level families.

Distance learning solutions were implemented globally across nations during the school closures in response to the COVID-19 pandemic to limit disruption in learning and access to basic education (Barron Rodriguez et al., 2021). The global reliance upon remote learning interventions calls for immediate and long-term assessment of their effectiveness and efficacy. The development of more inclusive forms of remote learning through diverse delivery channels, as well as strengthening communication between teachers, families, and learners, should be synchronized with national educational contexts that consider available resources, policy stakeholders, and the needs of learners, families, and teachers (Conto et al., 2020).

SSA Mitigation of Learning Loss
In SSA contexts, other irregular school closures caused by teachers' strikes, natural disasters, conflicts, and other viruses such as Ebola, have regularly amplified learning loss. However, the pandemic introduced additional challenges such as loss of income, food insecurity, adverse health impacts, grief, sexual and gender-based violence, socioemotional and well-being challenges, and lack of psychosocial and mental health support (Buonsenso et al., 2020; Mudiriza & De Lannoy, 2020). School closures also have negative effects on vulnerable learners living in poverty, particularly in lower-middle-income countries, as they may not have learning resources and literacy support at home to augment their skills instruction (Moscoviz & Evans, 2022). Additionally, the amalgam of complications in the SSA region may cause students to be left even further behind due to curriculum challenges wherein the instruction, curriculum content, and textbooks are often not aligned with the students' learning levels and needs (Abdazi, 2006; Glewwe et al., 2009; UNICEF, 2019).

It is difficult to measure learning loss induced by COVID-19 due to (1) different periods of school closures; (2) varying units of analysis utilized across studies; (3) general lack of post-pandemic data; and (4) challenges related to the administration of assessments to monitor learning progress during remote learning (ADEA[1], AU/CIEFFA[2] & APHRC[3], 2022; Angrist et al. 2021; Ardington et al., 2021; Azevedo et al., 2020; Kaffenberger, 2021; Soudien et al., 2021).

Measuring Learning Loss in SSA.
Education stakeholders have attempted to project and estimate learning loss across several LMICs. For instance, by using pre-pandemic data from Pakistan, classified as a lower-middle-income country, Kaffenberger (2021) projects that a school closure of up to

[1] Association for Development of Education in Africa
[2] African Union's International Centre for Girls' and Women's Education in Africa
[3] African Population and Health Research Center

one-third of the school year might incur learning loss of one Learning-Adjusted-School-Year (LASY) of grade 3 students by the time they reach grade 10. Similarly, a study using pre-pandemic SSA data from five African countries – Kenya, Ethiopia, Liberia, Tanzania, and Uganda – suggests that short-term learning loss of half to one year can incur up to 2.8 years of learning loss to grade 3 students by the time they reach grade 10 (Angrist et al. 2021; Sabates et al., 2021). Globally, projections show a 10% increase in learning poverty due to COVID-19-induced school closures, which may lead to significant long-term effects (Azevedo et al., 2020).

While it may be too early to compare the actual long-term learning loss to projections, emerging data reveal snapshots from several SSA contexts. From a voluntary survey in South Africa - a middle income country, it was reported that learners in grades one to five lost approximately 60% of their schooling days in 2020, resulting in an estimated reading 76% loss in the rate of their literacy development in the home language and 48% in English for grade four learners (Shepherd et al., 2021). In another study, Conto and colleagues (2021) examined the extent to which disrupted schooling and instances of dropout impact the acquisition of foundational literacy and numeracy skills, and the extent to which remote learning policies mitigated the learning crisis across seven SSA countries (Central African Republic, Chad, Congo Democratic Republic [D.R.C.], Ghana, Guinea Bissau, Lesotho, Madagascar, and Zimbabwe). The same study reports that children who were out of school tended to score from four to 51 percentage points lower in foundational literacy skills compared to their peers whose instruction was continuous. These findings suggest the school closures due to COVID-19 negatively influenced the ability of young children to continue their numeracy and literacy skills development.

Synthesis of evidence on learning loss also indicates that prolonged school closures and alternative schooling methods have contributed to a widening of the learning gap both within and across countries, furthering domestic and cross-national learning inequalities (Moscoviz & Evans, 2022; Wolf et al., 2021). In Ghana, the transition to distance learning has shown a disparaging effect on lower socio-economic status (SES) kindergarten students who have more difficulty engaging in remote learning. These young learners performed significantly worse in literacy and mathematics than their peers in higher SES contexts by 0.2–0.3 standard deviations (Wolf et al., 2021). Evidently, the degree of learning loss is context-dependent. LMICs with socioeconomic inequalities are more vulnerable to lasting educational impacts should interventions not take place (Soudien et al., 2021).

Challenges reported in the SSA Context

The pandemic presented several challenges in the education systems of many SSA countries. The significant challenges include lack of adequate resources to support continuity of learning and preparations for school reopening, government over-reliance on external financial resources, budget reallocations prioritizing public health, competition for national priorities, and pre-existing challenges that impeded financing education (ADEA, AU/CIEFFA, & APHRC, 2021). As a result, unequal access to education widened learning inequalities and threatened to leave the most vulnerable student populations even further behind. As of September 2022, learning in many regions had not resumed to the pre-pandemic pace and level. Throughout this time,

many parents were not able to adequately support at-home learning due to a lack of teaching and learning resources, their own lack of expertise to teach literacy, illiteracy challenges, limited or lack of internet connectivity, multiple children in a household needing support, limited devices in the family for connecting to the internet, parental unavailability, and lack of assessments to monitor the learning progress associated with radio and TV programs (Akinrinmade et al., 2021). Moreover, SSA countries have faced numerous challenges in assessment, including (1) poor preparation for assessment beyond classroom settings; (2) limited technology, unclear policies, and guidelines for assessing learning in the early grades; (3) limited capacities of teachers and students to manage distance learning and adopt technology in learning and assessment; and (4) the absence of baseline data from which to gauge learning loss (ADEA, AU/CIEFFA & APHRC, 2022).

Methods

We conducted a scoping review to report the types of interventions and responses to COVID-19 across SSA LMIC countries during and after school closures. A scoping review was appropriate for identifying available literature and providing a broad overview of findings and existing evidence from the field. This scoping review follows the Joanna Briggs Institute [JBI] guidelines based on the Population Concept Context (PCC) framework (Arksey & O'Malley, 2005; Joanna Briggs Institute, 2015). A JBI scoping review typically begins with the development of a priori protocol that details the inclusion and exclusion criteria that relates to the objective and review target questions, as well as relevant data extraction methods. The inclusion criteria are based on PCC framework where population refers to details of age, gender, race, and other qualifying criteria of the population. The concept is the main idea being examined by the scoping review and is articulated in the scope and breath of the inquiry. Lastly, context includes cultural factor's geographic location, and/or specific gender-based interests. This methodological approach is suitable and aligns with the objective of the study, which is to map available evidence and provide a broad overview of COVID-19 responses to strengthen early literacy skills in the SSA LMIC context. Our analysis methodology followed the Preferred Reporting Items for Systematic reviews and Meta-Analyses extension for Scoping Reviews sequencing (PRISMA-ScR) (Tricco et al., 2018). The PRISMA-ScR was developed to improve the methodological and reporting guidance of scoping reviews. PRISMA-ScR is a checklist of 20 essential items plus two optional items and includes the rationale for including each in the checklist. Our scoping review includes all the essential elements of the checklist.

Data Sources and Search Strategy

We utilized an open search strategy to locate relevant peer-reviewed published research as well as literature published by organizations outside academic journals (e.g., reports, working papers, white papers, etc.), often called grey literature. Four researchers searched on databases and organizational websites for relevant literature. The databases and publishers searched were Africa Bibliography, Africa Education Research Database, African Journals Online, ERIC, Evidence Hub, International Literacy Association, Open Knowledge Repository, Open Science, PsycINFO, Science Direct, Reading and Writing, and Web of Science. We also searched websites of funding agencies and development organizations, including American Institutes for Research; Creative Associates; Deutsche

Gesellschaft für Internationale Zusammenarbeit; Foreign, Commonwealth and Development Office; FHI 360; Global Reading Network; Research Triangle Institute International; Room to Read; Save the Children; UNESCO; UNICEF; United States Agency for International Development; and World Bank. We also reviewed the reference lists of relevant peer-reviewed articles and grey literature to locate additional relevant studies. Lastly, we requested manuscripts under review from academics in the field. The following sets of keywords were used: 1) emergent literacy, intervention, and COVID-19; 2) reading, learning loss, and COVID-19; 3) reading and writing and COVID-19; 4) recovery in learning and COVID-19; and 5) early grade literacy and COVID-19. We conducted manual searches for studies and gray literature on the listed topics. The initial search included the title and abstracts only and a second search used keywords and index terms within the full document texts.

Inclusion Criteria

The criteria established for the selection of the articles required that resources: 1) were published in English; 2) were peer-reviewed articles or grey literature; 3) examined the impact of COVID-19 responses/interventions for reading/writing; 4) were conducted in Low Income or Middle Income Countries (LMICs) in SSA; 5) were conducted with preprimary and/or primary grade learners; and 6) were published between March 2020 and September 2022. We focused on the early grades because these learners are most vulnerable to losing foundational literacy skills during extensive school closures. We excluded findings on learners in upper primary, secondary schools, and higher education institutions.

Charting the Data

Our database search resulted in the identification of 1,028 records (see Figure 1). An additional 18 records were identified through reference searching, bringing the total number of records to 1,046. Records were screened for duplicates and 122 records were removed, leaving 924 records for possible inclusion. We applied the inclusion criteria described above and excluded 897 documents. A total of 27 records: three peer-reviewed articles and 25 reports and grey literature were included in this scoping review.

Figure 1.
Flowchart of Record Identification and Screening
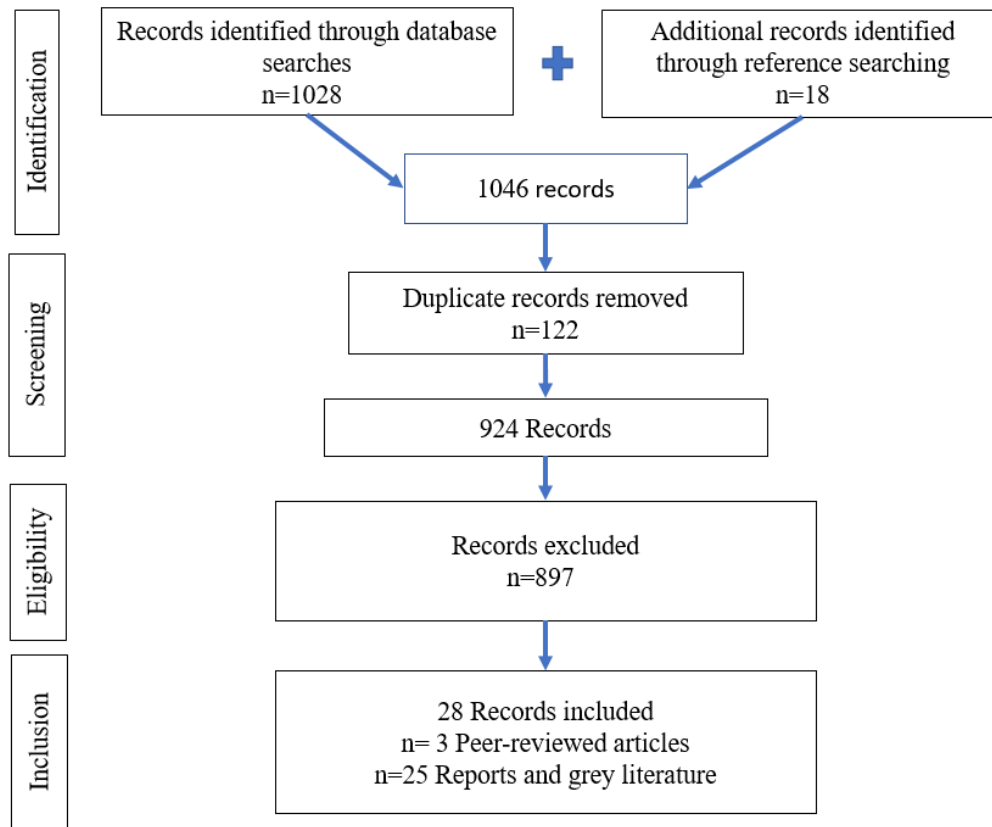
Summarizing and reporting results

We utilized a thematic content analysis with a narrative description of the extracted data. The team of researchers reviewed each resource and entered the following information into a shared Excel spreadsheet for analysis: sample/population, intervention/practice/policy recommendations, research methods, and findings. Inductive analysis consisted of identifying common themes from the data, reviewing data for patterns of themes, and identifying key themes related to critical aspects of responses, practices, and interventions used to mitigate early grade learning loss.

Strengths and Limitations

The present scoping review provides an SSA LMIC-focused comprehensive review of responses and interventions to mitigate learning losses and enhance the literacy skills of early grade students. One notable strength of the review is that it is informed by evidence from qualitative and quantitative studies as well as grey literature - providing multiple dimensions and perspectives of strategies implemented to mitigate learning loss. The focus of this scoping review is to provide a map of available evidence; however, we did not perform a quality appraisal of the evidence (Munn et al., 2018). Despite using rigorous search strategies, this review may have omitted studies that were

not captured in the databases and websites that were searched, or studies published in languages other than English. The review only highlights resources that were published from March 2020 to September 2022. Therefore, more evidence may be published after September 2022 that could critically inform this review. The evidence that highlights the mitigation measures for early grade reading and writing is drawn from select countries in SSA, although other reports and syntheses indicate that remote learning solutions were administered in 41 GPE countries in SSA (ADEA et al., 2021). It is not clear how all countries in SSA supported early grade reading during school closures since in many countries remote learning solutions prioritized examination classes (grades or classes eight through 12). It is important for future research to review extensively the mitigation measures implemented in the countries not highlighted in this study. These findings provide in-depth evidence that can inform policy guidelines on how to build back stronger and more resilient education programs across sub-Saharan Africa.

Results

The aim of the present scoping review is to examine types of policy responses and interventions implemented (and their reach) in SSA LMICs and aimed to mitigate negative impacts of learning loss on reading and writing skills among early grade learners due to COVID-19 school shutdowns. The conceptual categories for our studies are (a) resource type, (b) population, and (c) interventions. For the resource type, we included peer-reviewed articles and grey literature. For the population category, we focused on lower primary school children. Interventions focused on early grade literacy. Notably, Nigeria was overrepresented in 25% of the sources. The results are presented in Table 1.

Table 1. *Charting Table of Results*

Source	Country	Population	Responses to improve early literacy
ADEA, AU/CIEFFA, & APHRC, 2021	Select GPE Partner countries in SSA – Ghana South Sudan, Kenya, Zambia, Burkina Faso, Cabo Verde, Eritrea, Central African Republic, Sierra Leonne, Mozambique, Malawi, Senegal, and Republic of Congo	All ages	Distance learning solutions – radio, TV, tablets, digital library services/platforms, ICT educational programs, capacity development for teachers, development of teaching materials, audiovisual assistive devices for families, provision of student textbooks, posters, stickers pamphlets of education, radio-based learning kits,
ADEA, AU/CIEFFA & APHRC, 2022	Select GPE partner countries in SSA	All ages	Distance learning solutions such as Khan Academy, Seesaw, Edo-best, Zoom and Google meet, homework, quizzes, take home assignment packages, phone based assessments, live or pre-recorded lessons on Radio and TV, social media (WhatsApp)
Barron Rodriguez et al. (2021)	Nigeria, Malawi, Rwanda, Kenya, Zambia	All ages	Teacher training, radio instruction, TV, printed materials, diagnostic assessments, targeted remedial instruction, SMS, and social media
Conto et al. (2021)	Central African Republic, Chad, Congo D.R., Ghana, Guinea Bissau, Lesotho, Madagascar, and Zimbabwe.	Early and middle-grade students	Remote learning strategies: provision of online platforms to some learners; supply of a combination of online and other modalities (paper-based take-home materials, TV, Radio instruction)
Dang et al. (2021)	Burkina Faso, Mali, Nigeria, Ethiopia, Uganda, Malawi	All ages	Teacher assignments, radio instruction, television programs
FHI 360 (n.d. a)	Democratic Republic of Congo, Nigeria, Ghana	Grades 1 – 4	Interactive Radio Instruction
FHI 360 (n.d. b)	Ghana	Early grades	Delivery of high-quality training and instructional materials in 11 Ghanaian languages and English, Radio instruction
FHI 360. (2021a)	Ghana, Senegal	Grade 3-4	Remediation programs, after-school community-driven remediation programs, scripted reading, writing, math, and socio-emotional learning activities for trainers
FHI 360. (2021b)	Djibouti, DRC, Ghana, Madagascar, Nigeria, and Senegal	Early grades	Large-scale early learning interventions; early grade reading, writing, and mathematics assessments; highly structured classroom observation tools

FHI 360. (2021c)	Nigeria	Grades 4, 5 and 6	Hausa-language teacher training, early literacy material development, community mobilization, and government partnerships, Hausa literacy and math instruction in Integrated Qur'anic Schools.
FHI 360. (2021d)	Nigeria	Early grades	Teacher Professional Development, on-site teacher coaching, and local language materials development
FHI 360. (2022)	Sub-Saharan Africa	Adolescent girls	Developing instructional materials for literacy, enhancing teacher pedagogy, creating safe learning spaces, and strengthening accountability systems and education policies
Heaner, et al., (2021)	Nigeria, Zambia	Government officials/donors/teachers/stakeholders; Learners/donors/teachers/stakeholders from Zambia	Nigeria: Mobile App classrooms, Khan Academy, Radio & TV, WhatsApp for outreach; Policy guidelines on digitalization of learning, remedial/catch-up/accelerated learning, and extension of school terms; Zambia: Distance learning, radio instruction, TV programming, homework packets, catch up lessons, rotational school schedules, condensed curriculum
Kiendrebeogo et al. (2021)	Sierra Leone	All ages	Radio instruction
Save the children (2020a)	Rwanda, Malawi	Early grades	Literacy Boost approach, empowering children with disabilities to practice reading, home-directed interactive radio instruction
Save the Children (2020b)	Rwanda, Malawi	Not specified	Broadcast of radio drama series
UNESCO, UNICEF, World Bank. (2021)	Djibouti, Morocco, Libya, Sudan, and Tunisia	All ages	Radio instruction, TV, paper-based take-home packages, parental support, acceleration programs, teacher training
UNESCO, UNICEF, the World Bank, and OECD (2021)	Burkina Faso, Guinea, Kenya, Liberia, Madagascar, Sierra Leone, Zambia, Zimbabwe	All ages	Paper-based take-home materials, TV and radio, interactive mobile-based modalities using SMS or phone calls.
UNICEF (2021)	Uganda	Refugee hosting districts/early grade learners	Accelerated Education Programmes (AEP); Teaching at the Right Level in mother tongue (foundational literacy and numeracy skills)

The World Bank, UNESCO, and UNICEF (2021)	Botswana, Nigeria, Kenya, Rwanda, Zimbabwe	All ages	Texts and phone calls, re-enrolment campaigns, teacher training, provision of culturally and linguistically appropriate books, dialogic reading training for caregivers
UNICEF (2020)	multiple	149 Ministries of education	Policies on distance learning strategies, boost access to online learning, provide support for teachers, parents, and caregivers
UNESCO (2021) a	Congo, Mauritius, Gabon	Ministries of education	Recommended considerations for remediating learning loss 1. Assessing learning needs: diagnostic assessment to determine which skills and content need to be (re)taught 2. Adjusting pedagogy: (a) adaptive teaching; (b) condensed curriculum 3. Prioritizing, training, and supporting teachers 4. Emphasizing socio-emotional learning (SEL): (a) whole-school approach; (b) should target specific, clearly defined competencies; (c) incorporation of 4 elements 5. Ensuring gender equality
UNESCO (2021) b	Egypt, Djibouti, Libya, Tunisia, Morocco, Algeria, Sudan	All ages	Face-to-face learning for early grade learners, hybrid learning, and full remote learning for all grades. Television and radio, providing caregivers with materials to support home-based learning, regular follow-up phone calls
UNOCHA (2020)	Zambia		Literacy lessons aired on community radios, reading camps, teaching and learning materials (student packets), emergent literacy and math at home, digital library educational resources,
Zizi Afrique Foundation (2020)	Kenya	Grades 1 – 3	Radio instruction, reading packet, teaching assistants training
World Bank. (2020)	Ghana, Kenya, Nigeria, Tanzania	All ages	Radio instruction, TV, smartphones, YouTube channels, electronic books, accelerated learning programs
World Bank. (2021)	Rwanda	All ages	Radio instruction, TV, YouTube channel, and e-learning portals.

Our findings indicate that education stakeholders in various SSA countries (including MoGE, governments, and development partners), instituted a range of policy and practice responses during and after COVID-19 school closures (see Table 1). According to the World Bank, the predetermined policy categorizations include coping, managing and continuity, and improving and accelerating learning (World Bank, 2020). Education funding priorities for Global Partnership for Education (GPE) partner countries focused on distance learning solutions including radio instruction and television (TV) programming; teacher training on the use of distance learning solutions; effective practical approaches for using distance learning and assessing student skills; remedial teaching; and provision of water, sanitation, and hygiene (WASH) materials; personal protective equipment; resources to support school reopening; and support to vulnerable children (ADEA, et al., 2021). The policy responses and interventions were financed through within-government budget reallocations, adjustments to development partner programming (i.e., GPE, the World Bank, UNICEF, USAID, Family Health International 360 [FHI], Education Cannot Wait, the private sector, civil organizations), and support from individual households (ADEA et al., 2021). A majority of SSA countries conducted needs assessments and rapid mapping of available educational content in relevant languages of instruction (ADEA et al., 2021).

In alignment with countries globally, most SSA countries emphasized multimodal distance learning solutions, as there were generally limited teacher-student interactions during lengthy school closures to curb the spread of the COVID-19 virus (Dang et al., 2021). Evidence indicates that during school closures, an essential education response was the use of technology and remote learning disseminated through modalities such as radio instruction, television programs, smartphones (using short messaging services and phone calls), electronic textbooks, mobile apps, e-learning portals, social media, Khan Academy, National Open University, and UNESCO's School Meets Learner Approach (ADEA et al., 2021; Conto et al., 2021; Heaner et al., 2021; Kiendrebeogo et. al., 2021; UNESCO, 2020; World Bank, 2020, 2021).

Unfortunately, remote learning solutions were inaccessible to the majority of learners from marginalized, rural, and urban informal settlements due to lack of resources. Scarce resources included: internet connectivity, electronic devices (TV, smartphone, tablet, computer, and radio), digital content in the appropriate language of instruction, electricity coverage, funds for airtime or data, digital skills, quiet spaces for learning at home, and in-home books and learning materials (ADEA et al., 2021; ADEA et al., 2022; Heaner et al., 2021; UNESCO et al., 2021; UNOCHA, 2020). The SES and residential location were critical determinants of accessibility to remote learning opportunities. Pre-primary, lower primary, and marginalized learners (refugees, learners with disabilities, migrants, and girls) were at the highest risk of not receiving opportunities for continued exposure to learning (ADEA et al., 2021; ADEA et al., 2022). Reports indicate that more than 70% of pre-primary children could not be reached in SSA LMICs, and that this region of the world had the highest percentage of primary school children who could not access remote learning solutions that require technology: 49% in East/Southern Africa and 48% in West/Central Africa (Avanesian et al., 2021; Dang et al., 2021; UNESCO et al., 2021). Only 29% of primary school students from East/Southern Africa and 26% from West/Central Africa had access to a TV,

approximately 6% to 8% had access to the internet, and 35% to 46% had access to a working radio (UNICEF, 2020b).

Radio, Television, and Digital Programming for Literacy
During the pandemic, thousands of learners benefited from accelerated learning programs in conjunction with low-cost technologies and radio-based learning. Programs using radio instruction appeared to have reached the highest number of learners across the SSA LMIC context, particularly when pre-existing radio programs were adapted and radios were provided to learners with limited access to technology (Gondwe, 2020; Global Partnership for Education 2020; Zizi Afrique Foundation, 2020).

Findings indicate that learners across multiple countries (Burkina Faso, Kenya, Malawi, Nigeria, Rwanda, Tanzania, and Zambia) experienced government-sponsored radio and television program broadcasting that focused on all grades and parent/caregiver education (Kenya: Zizi Afrique Foundation, 2020; Tanzania: Save the Children, 2020b), existing primary school curricula (Malawi: Gondwe, 2020; Global Partnership for Education 2020; Nigeria: Fugate, n.d.a; Rwanda: Save the Children, 2020b; Zambia: MoGE, 2020a; UNESCO, 2020a), or on primary grades literacy and numeracy skills (Burkina Faso: UNICEF, 2020). Radio and television instruction was particularly powerful for Zambian children from rural areas, where MoGE partnered with UNESCO to launch a national e-learning portal for pre-primary and lower primary learners and in Kenya where the Kenya Institute of Curriculum Development provided learners with access to content using the Kenya Education Cloud such as interactive digital content, e-books, and the Edu-TV channel (MoGE, 2020a; UNESCO, 2020a). In Malawi, radio-based instruction supported early learning for more than 2 million children aged 5 years who received home-directed interactive radio instruction on early literacy and mathematics concepts (Save the Children, 2020b). Radio and home-based instruction have been more effective in developing reading skills in young children than children who did not receive intervention using either radio or home-based instruction in northern Nigeria and Ghana (FHI 360, 2021c).

Community Centers
Community learning centers were established to reach marginalized students and families without radios in many rural contexts, and these became critical for continued instruction during school shutdowns. In northern Nigeria, learners gathered at the community centers to listen to the radio lessons and receive additional support from trained teachers and facilitators (Heaner et al., 2021). Similarly, Ethiopia established reading camps with volunteers (community literacy leaders) who provided students with opportunities to practice their reading skills using books and hands-on supplementary reading materials (Ali, 2021). A local Rwandan organization, Youth Volunteers with Disabilities, ran workshops in several villages where children with disabilities were empowered to practice reading and engage in different activities with their parents (Save the Children, 2021).

Community-based programs and radio/TV-based programming also provided a platform for parental training and support, essentially creating home literacy structures. These programs exposed parents and caregivers to methods for supporting their children's reading development and home learning, life skills education, local library services where students were able to check out books for use at home with adults and

caregivers, feeding programs, teacher support, and home visits for the earliest learners (Dang et al., 2021; MoGE, 2020b; Room to Read, 2021; Save the Children, 2020b; World Bank, 2021; Zizi Afrique Foundation, 2021). By connecting parents with needed resources, community centers were able to continue providing education to school-aged children and meet the needs of the whole family (Room to Read, 2021; Save the Children, 2020b).

Teachers' Professional Development
During the pandemic shutdown, teachers needed to receive professional development training to be able to cope with the changing landscape of the classroom. Teacher professional development as provided to pre-service and in-service teachers through cascade (train the trainers) and coaching models to help teachers learn how to teach using various online modalities and how to repackage learning materials for student access through different platforms (ADEA, AU/CIEFFA, & APHRC, 2021). However, evidence indicates that only a limited number of teachers were able to benefit from the planned professional development trainings; the majority were not reached due to financial and/or logistical constraints (UNESCO, UNICEF, & World Bank, 2021). Remote professional development through cascade and coaching models as implemented in various regions to equipped teachers with knowledge and skillsets for remote learning and remedial teaching. PD focused on the use of digital technologies (Nigeria: Wafi, 2021) and on early grade reading, writing, and mathematics content, pedagogies, and assessment (Congo, D.R.C., Djibouti, Ghana, Madagascar, Nigeria, and Senegal: FHI 360, 2021a).

Assessment Methods
Monitoring student progress is critical to ensuring that learners receive a high-quality education, as assessment should inform instruction. The school closures that disrupted teaching and learning during the pandemic disrupted traditional assessment procedures as well. According to ADEA et al. (2022), the policy and response practices of assessment in GPE partner countries in SSA focused on take-home quizzes and homework, social media and web-based assessment platforms, high-stakes examinations, and evaluation of learning loss. Upper grades and examination classes were prioritized in most countries because they were either an examination class or were approaching the national assessments and needed support to prepare these high-stakes exit examinations. Assessments for the distance learning modalities were built into the lessons in the form of quizzes and tasks assigned at the end of the radio or TV lesson (ADEA et al., 2022).

Existing assessment tools were adapted and used in some countries during the COVID-19 pandemic. The Early Grade Reading and Mathematics Assessment was administered on a multiple-choice assessment on a virtual platform and formative assessments were delivered through a text message sent to learners or parents to measure mastery of the learning objectives for each lesson (Nigeria: UNICEF, 2021). Teachers also measured student skills through questionnaires and simple phone-based assessments in literacy and numeracy (Botswana (Angrist et al., 2020b, UNESCO, & UNICEF, 202; The World Bank, 2021). Teachers in Malawi, Namibia, Ghana, Ethiopia, and the Congo, D.R.C. utilized homework that contained quizzes and printed take-home packets (UNICEF, 2020b). In Rwanda, a national diagnostic assessment was

administered to children in primary schools to identify students from low SES backgrounds who should receive remedial learning once schools reopened. In Zambia, assessments were conducted nationally to identify learning gaps and inform remedial learning programming to enable all children to catch up at the grade level (Matwafali & Masaiti, under review). In Mauritania, teachers administered assessments in the form of take-home packets with quizzes to complement the radio and TV lessons with a focus on students from marginalized and rural areas (Dreesen et al., 2020).

Monitoring and evaluation (M&E) frameworks were designed to assess learning continuity and catch-up learning. Findings reveal that radio and home-based instruction have been more effective in developing reading skills in young children than no intervention. Those lacking access to interventions consequently exhibited a greater magnitude of learning loss and were at-risk of lagging further behind their peers. Furthermore, the cluster randomized control trial (CRCT) reveals evidence of the positive impacts of math-themed read-aloud stories and syllabic instruction for Hausa language reading (FHI 360, 2021c).

Interventions after Schools Reopened

The African Union (2020) encouraged its member states to agree on Return-to-School frameworks, processes, and principles that ensured safe learning continuity. The plan included adjusting academic calendars and instituting catch-up or remedial programs (UNESCO, 2021a, b).   School reopening interventions included rotational school schedules (e.g., Heaner et al., 2021), accelerated learning programs and Teaching at the Right Level (TaRL approaches [MoGE, 2021b; UNICEF, 2021b; World Bank, 2020]), and after-school community-driven remediation programs. To make up for lost time, some governments delayed school holidays (e.g., MoGE, 2021b). The Nigerian states of Borno, Adamawa, and Sokoto changed school operations by extending the number of days children attended school (Heaner et al., 2021). Countries like Zambia designed M&E strategies to assess implementation fidelity for remote learning or accelerated learning when schools reopened (MoGE, 2020b).

Discussion

Our present scoping review presents a summary of interventions, responses, and measures implemented across several SSA LMIC countries aimed to mitigate learning loss and address the pervasive learning crisis. As a result of school closures due to the pandemic, researchers project a high magnitude of learning loss, particularly for early grade learners (Angrist et al., 2021). Learning challenges in SSA such as lack of teaching and learning resources, ineffective pedagogical approaches, overcrowded classrooms, and lack of home literacy support (Dubeck et al., 2012; Kim et al., 2016) have been exacerbated by the COVID-19 pandemic. Our findings indicate that local and international education stakeholders in many SSA LMIC countries collaborated with Ministries of General Education and attempted to use technological interventions as well as paper-based distance learning methods and exerted measures in the form of institutionalized policies to mitigate learning loss during and after school closures (UNESCO, 2020, 2021). Global trends show reduced teacher-student contact during school closures and consequently, reduced literacy instruction (Dang et al., 2021). The

policy responses and interventions discussed herein aimed to ensure access to education and enhanced equity by targeting vulnerable and marginalized learners, including those with special needs, girls, out-of-school children, refugees, and students from lower SES backgrounds.

During school closures, many countries adapted multimodal distance learning solutions to ensure continuity of learning for all the learners (ADEA et al., 2022; Conto et al., 2021; Kiendrebeogo et al., 2021; UNESCO, 2020; World Bank, 2020). Children in the early grades received instruction through mainly radio and TV programing. Technical experts from local MoGEs and development partners created content in relevant languages of instruction that was broadcasted through national and community radio stations. Despite huge efforts to disseminate content through distance learning modalities, many children in multiple countries received no instruction and were not reached due to major challenges such as access to technology, devices, poor/no internet penetration, and poor or no electricity coverage (ADEA et al., 2021; ADEA et al., 2022; Heaner et al., 2021; UNESCO et al., 2021; UNOCHA, 2020). The evidence from SSA LMIC corroborates with response mechanism in other contexts (middle and high-income settings) where the immediate response to ensure learning continuity and access to basic education was distance learning solutions (Barron Rodriguez et al., 2021). The take-up of remote learning solutions was high in middle and high-income countries with high levels of scale and scope of remote learning measures (Muñoz-Najar et al., 2021).

While the remote learning solutions programs focused on developing component skills of literacy in a variety of languages of instruction, limited evidence exists on dimensions such as engagement during learning, frequency of use, uptake, check for learning measures, and learning progress (Barron Rodriguez et al., 2021). Foundational literacy instruction should be systematic and explicit particularly for code-focused skills, oral language and vocabulary skills that are building blocks for text reading fluency and reading comprehension (Foorman et al., 2020; Petcher et al., 2020). Teaching the code-focused skills needs in many LMICs has been limited to classroom studies. Hence, in order to teach effectively, the teacher needs to possess competence in pedagogical content knowledge and the capability to adjust their teaching practices to engage students effectively in the learning process.

Many studies reviewed do not highlight the frequency and regular access of the radio and TV lessons. Learning via TV and radio modalities does not allow teacher-student interaction, which is critical for learners in early grades. Thus, it is difficult to check for learning, implement classroom management practices (i.e., monitoring time on task), evaluate whether students understand the content and have achieved the learning objectives, provide feedback, or determine whether learners have necessary supports and materials (UNESCO, 2020). Distance-learning modalities complicate attempts to differentiate instruction and cater to the individual needs of students. Crosson and Silverman (2022) reported key barriers to remote instruction such as a lack of opportunities for small group discussion (reduced support for language and vocabulary skills) and technological challenges due to learning to use new software.

There were notable challenges in best approaches to teach the component skills of reading comprehension. For instance, teaching phonological awareness through video

instruction where the teacher shares their screen is considerably different from in-person contexts where teachers use visual aids and children can observe the teacher's lips. Furthermore, students need to practice models of the phonological aspects presented by the teacher in the lessons such as articulating phonemes, segmenting and blending phonemes. This is particularly impactful when teaching foundational literacy skills such as phonemic awareness and phonics, as the teacher models how to enunciate the sound. In the other component skills, the teacher needs to guide children to read the stories multiple times to help them improve their accuracy rate. Engaging learners in vocabulary and reading comprehension strategies such as introducing new vocabulary and practicing the use of new vocabulary, prediction of the story and activation of prior knowledge, engaging students in comprehension activities such as retell, sequencing, summarizing, and answer factual and inferential questions require in-depth student-teacher interactions which are limited in a one-way model of dissemination. In alignment with other low-income settings, writing instruction and practice in SSA LMICs was very limited due to a lack of technology to support writing practice, poor organizational structure, inaccessibility of writing materials, and lack of opportunities to model writing (Akinrinmade et al., 2021; Crosson & Silverman, 2022). Assessment is critical for monitoring students' learning progress and measuring reading effectiveness. There is limited evidence on policies and guidelines on learning assessment during school closures. Thus, in many regions it was difficult to measure learning loss or gains that those children made as a result of remote learning (ADEA et al., 2022). This brings into question the reach and reliability of these interventions. If children are not able to be assessed using one of the most basic and far-reaching forms of distance learning technology (radio), then education stakeholders must seriously reconsider the infrastructure of education in contexts absent of community learning centers. It is also critical for countries to track students' learning progress through standardized assessments at all grade levels stored in secured national or regional databases. Available data can be used to make comparisons of learning gains/loss over time and is critical to informing classroom instruction. Countries might also establish curriculum-based remote assessments for all grade levels with accommodations for learners with special needs, should these be required in the future.

Key Lessons for Reflection by SSA Countries as They Continue to Mitigate
Literacy-Learning Loss
Evidence indicates that SSA countries continue to enact policies and interventions aimed to mitigate the learning crisis. These findings highlight several key lessons that SSA countries can draw from in order to build back stronger and more resilient education systems, and ultimately improve foundational literacy skills among early grade learners. UNESCO (2021) proposed several recommendations for remediating learning loss in Congo, D.R.C., Mauritius, and Gabon. The key lessons include administering a needs or diagnostic assessment to establish which skills need to be retaught, using an adaptive teaching methodology with a condensed curriculum, prioritizing teacher training, emphasizing socioemotional learning, targeting instruction for specific competencies, and focusing on gender equality. It is crucial for policymakers and educational stakeholders to emphasize pre-primary education, as this population was hardly reached during school closures (Avenasian et.al, 2021). Angrist and colleagues (2021) suggest interventions to improve learning outcomes of foundational literacy skills include providing instruction targeted to a child's level and using structured pedagogy

programs. Programs that include structured lesson plans, teacher and student books, teacher training and PD, and teacher instructional support while allocating an hour each school day to a TaRL approach may help children catch up on skills they missed during school closures. SSA countries might also use the COVID-19 pandemic as a springboard to initiate curriculum reforms that include TaRL and structured pedagogy, with an emphasis on community learning centers for supplemental learning opportunities outside the classroom. Regarding learning assessment, ADEA, AU/CIEFFA, and APHRC (2022) recommend that GPE partner countries reimagine and adopt EdTech in learning and assessment processes by expanding the use of technology beyond formative assessments (e.g., the creation of early grade reading self-evaluation tools that automatically score and provide solutions to problems). Education systems that build the teachers' and administrators' capacity to use digital technology for assessments and create awareness/build parental capacity for supporting home learning while also allocating more domestic resources to education will ultimately be able to react in a timely and effective manner during emergency responses. There is a need to prioritize SSA country investments into education technology and distance learning infrastructure, particularly in remote areas where learners may have little or no access to onsite learning during emergencies (ADEA et al., 2021).

Conclusion

The education sector in SSA was severely weakened by the COVID-19 pandemic and was unprepared to tackle the challenges presented. The efforts to respond to and mitigate the learning loss crisis were not all-inclusive, as the most vulnerable populations were not reached and continue to be at-risk of falling further behind their peers. These findings exemplify the widened achievement and inequality gap in education that affect learners from low-income contexts. There is an urgent need to support vulnerable populations of students, particularly preschool and early grade children, to acquire foundational literacy and numeracy skills. Governments may consider prioritizing TaRL pedagogical approaches, financing, technology, digital learning, different modalities of assessment, parental support and engagement, and continued teacher training in order to meet these children's needs. Further empirical evidence on the extent of learning loss is needed to inform the continued responses and interventions.

Dr. Brenda Wawire *is an Associate Research Scientist at the African Population and Health Research Centre. She has research experience in literacy acquisition across languages, second language acquisition, and pre-service and in-service reading teacher training. Dr. Wawire currently supports education stakeholders in multilingual contexts to implement structured interventions to support early grade students with reading difficulties.*

Dr. Adrienne Barnes-Story *is a Literacy, Pedagogy, and Research Specialist with Learning Systems Institute at Florida State University. She has over 20 years of experience in education research and international education and development. Dr. Barnes-Story currently supports several developing countries to design primary curricula and teacher/stakeholder professional development materials.*

Dr. Elisheba Kiru *is a Post-doctoral Research Scientist at the African Population and Health Research Center. Her research interests/scholarship include understanding innovative pedagogies using learning technologies, special education, inclusive education, and comparative and international education. She is a scholar-practitioner with experience teaching in K-12 settings, coaching pre-service and veteran teachers.*

Sungkyum Kim *is a PhD student in the International and Multicultural Education program at the College of Education, Florida State University. In support of the Learning Systems Institute at Florida State University, he is currently supporting a project for designing primary teacher curricula and faculty professional development in Malawi.*

References

Abadzi, H., (2006). *Efficient Learning for the Poor: Insights From the Frontier of Cognitive Neuroscience*. World Bank, Washington, DC. https://openknowledge.worldbank.org/handle/10986/7023

ADEA, AU/CIEFFA, & APHRC (2021). *Financing education in Africa during the COVID-19 pandemic*. Abidjan, Ouagadougou, Nairobi: ADEA, AU/CIEFFA, APHRC.

ADEA, AU/CIEFFA, & APHRC (2022). *Learning assessment during the COVID-19 in Africa*. Abidjan, Ouagadougou, Nairobi: ADEA, AU/CIEFFA, APHRC.

Akinrinmade, B., Ammani, M., & Zuilkowski, S. (2021). Parental support for literacy development of early grade children during COVID-19 school closures in northern Nigeria. *Global Education Review*, *8*(1), 1–13.

Ali, B. (2021). On phone, T.V, radio, Ethiopian families find support for remote learning. Creative Associates International. https://www.creativeassociatesinternational.com/stories/on-phone-tv-and-radio-ethiopian-families-find-support-for-remote-learning/

Angrist, N., De Barros, A., Bhula, R., Chakera, S., Cummiskey, C., DeStefano, J., Floretta, J., Kaffenberger, M., Piper, B., Stern, J. (2021). Building back better to avert a learning catastrophe: Estimating learning loss from COVID-19 school shutdowns in Africa and facilitating short-term and long-term learning recovery, *International Journal of Educational Development*, *84*, 1–14. Doi: https://doi.org/10.1016/j.ijedudev.2021.102397

Archer, A. L., & Hughes, C. A. (2011). *Explicit instruction: Effective and efficient teaching*. New York: Guilford Press.

Ardington, C., Wills, G., Kotze, J. (2021). COVID-19 learning losses: Early grade reading in South Africa, *International Journal of Educational Development*, *86*, 1–11. Doi: https://doi.org/10.1016/j.ijedudev.2021.102480

Arksey, H., & O'Malley, L. (2005). Scoping studies: towards a methodological framework, *International Journal of Social Research Methodology, 8*(1), 19–32. Doi: https://doi.org/10.1080/1364557032000119616

August, D., & Shanahan, T. (2006). *Developing literacy in second-language learners: Report of the National Literacy Panel on language-minority children and youth.* Lawrence Erlbaum Associates.

Avanesian, G., Mizunoya, S., Amaro, D. (2021). How many students could continue learning during COVID-19-caused school closures? Introducing a new reachability indicator for measuring equity of remote learning, *International Journal of Educational Development, 84.* Doi: https://doi.org/10.1016/j.ijedudev.2021.102421

Azevedo, J. P., Harrison, A., Goldemberg, D., Iqbal, S. A., Geven, K. (2020). *Simulating the Potential Impacts of COVID-19 School Closures on Schooling and Learning Outcomes: a Set of Global Estimates.* Policy Research Working Paper no. 9284. World Bank, Washington, DC, p. 2020.

Barron Rodriguez, M., Cobo, C., Munoz-Najar, A., Sanchez Ciarrusta, I. (2021). *Remote learning during the global school lockdown: Multi-country lessons.* World Bank, Washington, DC. https://openknowledge.worldbank.org/handle/10986/36141

Buonsenso, D., Cinicola, B., Raffaelli, F., Sollena, P., Iodicee, F. (2020). Social consequences of COVID-19 in a low resource setting in Sierra Lione, West Africa, *International Journal of Infectious Diseases, Vol.97*, 23–26. Doi: https://doi.org/10.1016/j.ijid.2020.05.104

Conto, C. A., Akseer, S., Dreesen, T., Kamei, A., Mizunoya, S., Rigole, A. (2020). COVID-19: Effects of School Closures on Foundational Skills and Promising Practices for Monitoring and Mitigating Learning Loss, UNICEF Office of Research – Innocenti Working Paper no. 2020-13. UNICEF. https://www.unicef-irc.org/publications/pdf/COVID-19_Effects_of_School_Closures_on_Foundational_Skills_and_Promising_Practices_for_Monitoring_and_Mitigating_Learning_Loss.pdf

Conto, C. A., Akseer, S., Dreesen, T., Kamei, A., Mizunoya, S., & Rigole, A. (2021). Potential effects of COVID-19 school closures on foundational skills and country responses for mitigating learning loss. *International Journal of Educational Development*, *87*, 102434. Doi: https://doi.org/10.1016/j.ijedudev.2021.102434

Crosson, A. C., & Silverman, R. D. (2022). Impact of COVID-19 on early literacy instruction for emergent bilinguals. *Reading Research Quarterly, 57*(1), 5–14.

Dreesen, T., Akseer, S., Brossard, M., Dewan, P., Giraldo, J. P., Kamei, A., & Ortiz, J. S. (2020). *Promising practices for equitable remote learning: Emerging lessons from COVID-19 education responses in 127 countries.* Office of Research-Innocenti, UNICEF. UNICEF. https://www.unicef-irc.org/publications/pdf/IRB%202020-10.pdf

Dubeck, M. M., Jukes, M. C., & Okello, G. (2012). Early primary literacy instruction in Kenya. *Comparative Education Review*, *56*(1), 48–68. Doi: https://doi.org/10.1086/660693

FHI 360 (2021a). *Foundational Skills Remediation*. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-foundational-skills-factsheet.pdf

FHI 360 (2021b). *Research and Evaluation*. Fact Sheet. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-research-evaluation-factsheet.pdf

FHI 360 (2021b). *FHI 360 Nigeria*. Policy Brief. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-nigeria-factsheet.pdf

FHI 360 (2021d). *Literacy: Improving learning outcomes in the early grades*. Fact Sheet. https://www.fhi360.org/resource/literacy-improving-learning-outcomes-early-grades-fact-sheet

FHI 360 (2021e). *Social Emotional Learning in Emergencies*. Fact Sheet. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-factsheet-social-learning.pdf

FHI 360 (2022). *Evidence and Strategies for Adolescent Girls' Education Programming*. A Business Brief. https://www.fhi360.org/sites/default/files/media/documents/resource-adolescent-girls-programming-brief.pdf

FHI 360. (n.d.a). *Distance Education*. Policy Brief. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-distance-education.pdf

FHI 360 (n.d.b). *Global Education*. Policy Brief. https://www.fhi360.org/sites/default/files/media/documents/resource-ed-global-brochure.pdf

Foorman, B. R., Wu, Y. C., Quinn, J. M., & Petscher, Y. (2020). How do latent decoding and language predict latent reading comprehension: across two years in grades 5, 7, and 9?. *Reading and Writing*, *33*, 2281–2309. Doi: https://doi.org/10.1007/s11145-020-10043-3

Fugate, J. (n.d.a). Radio lessons in Northern Nigeria support reading during COVID-19 pandemic. Creative Associates International. https://www.creativeassociatesinternational.com/stories/radio-lessons-in-northern-nigeria-support-reading-during-the-covid-19-pandemic/

Fugate, J. (n.d.b). Local NGOs are changing the landscape of education in rural Mozambique. Creative Associates International. https://www.creativeassociatesinternational.com/stories/local-ngos-are-changing-the-landscape-of-education-in-rural-mozambique/

Glewwe, P., Kremer, M., Moulin, S., (2009). Many Children Left Behind? Textbooks and Test Scores in Kenya. *American Economic Journal: Applied Economics*, *1* (1), 112–135. Doi: https://doi.org/10.1257/app.1.1.112

Global Partnership for Education. (2020). Malawi: COVID-19 Response. https://www.globalpartnership.org/where-we-work/malawi

Gondwe, G. (2020). "Learning Through the Radio Amid COVID-19." Web article. UNICEF. https://www.unicef.org/malawi/stories/learning-through-radio-amid-covid-19

Heaner, G., Flemming, J., Chinnery, J., & Shah, R. (2021). Resilience in Return to Learning During COVID-19: Five country synthesis report. Research Space. https://researchspace.auckland.ac.nz/handle/2292/59596

Joanna Briggs Institute. (2015). *The Joanna Briggs Institute Reviewer's Manual 2015: Methodology for JBI Scoping Reviews*, The Joanna Briggs Institute.

Kaffenberger, M. (2021). Modelling the long-run learning impact of the Covid-19 learning shock: Actions to (more than) mitigate loss, *International Journal of Educational Development*, *81*, 1–8. Doi: https://doi.org/10.1016/j.ijedudev.2020.102326

Kiendrebeogo, Y., Mansaray, K., Foster, E. M., Baibagysh Uulu, A., Sattar, S., Kosmidou-Bradley, W. T., & Mistiaen, J. A. (2021). Sierra Leone 2021 Economic Update: Welfare and Poverty Effects of the COVID-19 Pandemic. World Bank Group. Policy Commons. https://policycommons.net/artifacts/1806740/sierra-leone-2021-economic-update/2540669/ on 26 Jan 2023. CID: 20.500.12592/jb5k03

Kim, Y. S. G., Boyle, H. N., Zuilkowski, S. S., & Nakamura, P. (2016). *Landscape Report on Early Grade Literacy*. Washington, D.C.: USAID.

Kim, Y. S. G., Lee, H., & Zuilkowski, S. S. (2020). Impact of literacy interventions on reading skills in low‐and middle‐income countries: A meta‐analysis. *Child development*, *91*(2), 638–660. https://doi.org/10.1111/cdev.13204

MoGE. (2020a). *Education contingency plan for novel coronavirus (COVID-19)*. Republic of Zambia Ministry of General Education. Planipolis. https://planipolis.iiep.unesco.org/sites/default/files/ressources/moge-novel-coronavirus-covid-19-response-and-recovery-plan-2020-final.pdf

MoGE. (2020b). *Zambia develops an education contingency plan for COVID-19 and the post-pandemic era,* UNESCO. UNESCO. http://www.unesco.org/new/en/member-states/single-

Moscoviz, L., & Evans, D. (2022). *Learning Loss and Student Dropouts during the COVID-19 Pandemic: A Review of the Evidence Two Years after Schools Shut Down*. Center for Global Development. Working Paper 609. Washington, DC: Center for Global Development

Mudiriza, G., De Lannoy, A. (2020). *Youth emotional well-being during the COVID-19-related lockdown in South Africa*. SALDRU Working Paper no. 268. OPEN Saldru. https://www.opensaldru.uct.ac.za/bitstream/handle/11090/991/2020_268_Saldru wp.pdf?sequence=1

Munn, Z., Peters, M. D., Stern, C., Tufanaru, C., McArthur, A., & Aromataris, E. (2018). Systematic review or scoping review? Guidance for authors when choosing between a systematic or scoping review approach. *BMC medical research methodology*, *18*(1), 1–7.

Muñoz-Najar, A., Gilberto, A., Hasan, A., Cobo, Cr., Azevedo, J. P., Akmal, M. (2021). Remote Learning during COVID-19: Lessons from Today, Principles for Tomorrow. Washington, D.C.: World Bank Group.

Petscher, Y., Cabell, S. Q., Catts, H. W., Compton, D. L., Foorman, B. R., Hart, S. A.,Lonigan, C.J., Phillips, B.M., Schatschneider,C., Steacy, L.M., Patton, T. N., & Wagner, R. K. (2020). How the science of reading informs 21st‐century education. *Reading Research Quarterly*, *55*, S267–S282.

Piedra, N.P & Reimers, F. (2020). *Brazil: Educação Infantil no Maranhão (Early Learning in Maranhão)*. Education continuity stories series. OECD Publishing, Paris. World Bank. http://documents1.worldbank.org/curated/en/277301599119523264/ pdf/Brazil-Educacao-Infantil-no-Maranhao-Early-Learning-in-Maranhao.pdf

Sabates, R., Carter, E., & Stern, J. M. (2021). Using educational transitions to estimate learning loss due to COVID-19 school closures: The case of Complementary Basic Education in Ghana. *International Journal of Educational Development*, *82*. Doi: https://doi.org/10.1016/j.ijedudev.2021.102377

Sandefur, J. (2022). *Uganda's Record-Breaking Two-Year School Closure Led to No Decline in the Number of Kids Who Can Read?* Center for Global Development. CGDEV. https://www.cgdev.org/blog/ugandas-record-breaking-two-year-school-closure-le d-to-no- decline-number-kids-who-can-read

Save the Children (2020a). *Protect every child's right to learn in the COVID-19 response and recovery*. https://resourcecentre.savethechildren.net/document/save-our-education-protect-every-childs-right-learn-covid-19-response-and-recovery/

Save the Children (2020b). *Keeping literacy alive during COVID-19.* https://www.savethechildren.net/blog/keeping-literacy-alive-during-covid-19

Shanahan, T., & Lonigan, C. J. (2010). The National Early Literacy Panel: A summary of the process and the report. *Educational Researcher*, *39*(4), 279–285. Doi: https://doi.org/10.3102/0013189X10369172

Shepherd, D., Mohohlwane, N., Taylor, S., & Kotzé, J. (2021). *Changes in education: A reflection on COVID-19 effects over a year*. NIDS-CRAM Working Paper. Cram Survey. https://cramsurvey.org/wp-content/uploads/2021/05/10.-Shepherd-D.-Mohohlwane-N.-Taylor-S.-_-Kotze-J.-2021.-Changes-in-education-A-reflection-on-COVID-19-effects-over-a-year.pdf

Slade, T. S., Piper, B., Kaunda, Z., King, S., & Ibrahim, H. (2017). Is 'summer' reading loss universal? Using ongoing literacy assessment in Malawi to estimate the loss from grade-transition breaks. *Research in Comparative and International Education*, *12*(4), 461–485. Doi: https://doi.org/10.1177/1745499917740657

Soudien, C., Reddy, V., & Harvey, J. (2021). *The impact of COVID-19 in a fragile education system: The case of South Africa*. In Reimers, F. M. (Ed.), *Primary and Secondary Education During COVID-19: Disruptions to Educational Opportunity During a Pandemic* (pp. 303–325). Springer Nature.

Tricco, A. C., Lillie, E., Zarin, W., et al. (2018). PRISMA extension for scoping reviews (PRISMA-ScR): checklist and explanation. *Annals of Internal Medicine* 169, 467–473.

UNESCO. (2021). *COVID-19 Learning Losses Rebuilding Quality Learning for All in the Middle East and North Africa*. UNESCO. https://unesdoc.unesco.org/ark:/48223/pf0000380118?locale=en

UNICEF (2019). *A World Ready to Learn: Prioritizing Quality Early Childhood Education*. UNICEF, New York. https://www.unicef.org/reports/a-world-ready-to-learn-2019.

UNICEF. (2020a). *Burkina Faso: radio lessons while schools remain closed*. UNICEF, New York. https://www.unicef.org/burkinafaso/en/stories/burkina-faso-radio-lessons-while-schools-remain-closed

UNICEF. (2020b). *Covid-19: Are children able to continue learning during school closures? A global analysis of the potential reach of remote learning policies using data from 100 countries*. https://data.unicef.org/resources/remote-learning-reachability-factsheet/

United Nations. (2015). *Transforming Our World: The 2030 Agenda for Sustainable Development*. New York: UN Publishing. Book.

UNOCHA. (2020). *Zambia Situation Report, 9 December 2020*. Relief Web. https://reliefweb.int/report/zambia/zambia-situation-report-9-december-2020.

Uwezo (2016): Are Our Children Learning? Uwezo Kenya Sixth Learning Assessment Report. Nairobi: Twaweza East Africa. Twaweza. https://twaweza.org//wp-content/uploads/2021/01/UwezoKenya2015ALAReport-FINAL-EN-web.pdf

Zizi Afrique Foundation. (2020). Accelerated Learning Program. Jisomee Jitegemee. https://ziziafrique.org/wp-content/uploads/2019/05/2020_ALP_ProgressBooklet_Final.pdf

Wolf, S., Aurino, El. Suntheimer, N., Avornyo, E., Tsingio, E. (2021). *Learning in the time of a pandemic and implications for returning to school: Effects of COVID-19 in Ghana*. CPRE Working Papers. University of Pennsylvania. https://repository.upenn.edu/cpre_workingpapers/28

World Bank. (2020). *The COVID-19 pandemic: Shocks to education and policy responses*. May, 2020. https://openknowledge.worldbank.org/bitstream/handle/10986/33696/148198.pdf

World Bank. (2021). Rwanda economic update, January 2021: *Rwanda Economic Update Protect and Promote Human Capital in a Post-COVID-19 World*. World Bank. https://openknowledge.worldbank.org/handle/10986/35111

World Bank, UNESCO, and UNICEF (2021). *The State of the Global Education Crisis: A Path to Recovery*. Washington D.C., Paris, New York: The World Bank, UNESCO, and UNICEF. https://www.worldbank.org/en/topic/education/publication/the-state-of-the-global-education-crisis-a-path-to-recovery

Education as an international export: Marketing elite, English schools as franchises overseas

Stefano Hollis
Stanford University Graduate School of Education

A growing portion of international schools are franchised branches of schools originally founded in other countries. The first of such schools opened in 1996 and there are now almost 100 globally. Expansionist schools are primarily elite, English private schools, with concentrations of their franchises developing in the Middle East, Southeast Asia, and East Asia over the past quarter of a century—particularly in mainland China over the past decade. This study explores how such schools adapt the language and focus of their marketing and, in doing so, sustain their privilege across various contexts. A qualitative textual analysis is conducted of the websites of 11 schools run by Dulwich College and Harrow School, the first brands to expand overseas and with the most extensive networks of schools today. A lens of international schools as enclosures of privilege is used to demonstrate how schools adapt themselves and their framing. The study finds the promotional focus of the schools depends not just on whether they are the founding school or a franchise, but also on their relative ages, and on their varying locations within specific sociocultural contexts. An emergent hybrid model, catering to both local and international curricula, blends the local with the global and complicates the conventional notion of the international school. Finally, the study suggests that further research is focused on the franchising of elite education, particularly as the focal point of expansion begins to shift away from the mainland Chinese boom of the past decade.

Keywords: international education, international schools, school expansion, elite education, oversees franchise schools

Introduction

In 1572, Queen Elizabeth I granted a royal charter opening Harrow School in north London (Tyerman, 2000). Just some decades later in 1619 and on the other side of the city, Dulwich College was founded (Blanch, 1877). The schools' long histories, notable alumni, and strong academic records—as well as some of the highest fees in England—have made them both prominent and illustrious names within a busy market for private secondary schools in the UK (Peel, 2021). Both were also the first anglophone schools, hundreds of years later, to expand transnationally in the form of overseas franchise schools.

Dulwich pioneered the trend by opening a franchise in Phuket, Thailand in 1996, with Harrow opening in Bangkok in 1998 (Bunnell, 2008a). Today, there are over 73 franchise schools opened by primarily English institutions (Bunnell et al., 2020), but Dulwich and Harrow remain the two schools with the greatest overseas presence. Whilst both schools have been well established in the UK for centuries, there has yet to be focused research into how they might translate their reputation and appeal to remain high-status options both across new cultural contexts and in spite of their expansion widening access to their brand names.

With this emergent trend "operating within the periphery of the blurred field of 'international schools'" (Bunnell, 2008a, p. 384), so far there has been little scholarly attention paid to the overseas franchises of elite, anglophone schools. Research looks more generally at international schooling (Hayden & Thompson, 1995; Pearce, 2013), or at the further developed "parallel phenomenon" (Bunnell, 2008a, p. 384) of transnational expansion in higher education (Becker, 2010; Farrugia & Lane, 2013; Healey, 2015; Kosmützky & Putty, 2016; Lane, 2011; Merola, 2016; Wilkins & Huisman, 2012, 2015). Studies have mostly documented the extent of schools' transnational expansion and, at times, the motivations behind it (Bunnell, 2008a; Bunnell et al., 2020). As such, there has yet to be any systematic comparison of the ways in which founding and franchise schools situate themselves within various contexts and appeal to diverse groups of elite consumers.

The success of franchise schools is evidenced by their growth, though it remains to be seen how they portray themselves as places of privilege, and particularly how they do so in markets already saturated with local schools and competing, independent international schools. This paper uses textual content analysis to explore how Harrow School and Dulwich College frame themselves as places of privilege to parents in their various locations. This focused exploration of how elite names—with considerable heritage and strong reputations in the UK—portray themselves to new consumers contributes to an understanding of the ways in which privilege is managed and sustained across varied contexts in an increasingly global education market.

The primary research question of this study is: How do Dulwich College and Harrow School frame themselves as places or "enclosures" of privilege by way of appealing to prospective parents and students? The study's secondary questions are: (1) What are the similarities and differences in this framing between the original, founding schools, and the newer franchises overseas? and (2) What are the similarities and differences between franchises in various locations?

Background

The origins of international schooling, according to the International School Consultancy, date back at least to the 19th century: 10 of over 1,300 schools registered with the Council of International Schools were founded before 1900 (Hayden & Thompson, 1995; Pearce, 2013. International schooling began on a small scale, offering education in home languages and systems for the children of diplomats and expatriates. In the past 50 years, this narrow consumer base has broadened, with the sector seeing its most pronounced growth in recent decades. In January 2007, there were 4,563 international schools globally. By October 2019, there were 11,320 such schools educating

5.7 million students worldwide (Bunnell, 2008b). Growth has been particularly pronounced in Asia, driven by rising incomes and demand for English language education. In 2000, Hong Kong had 92 international schools. By 2017, it had 176. Over the same period, Thailand went from 12 international schools to 121 (Machin, 2017). Other estimates suggest the number of international schools across Asia grew by 334% between 2000 and 2007 (Brummitt, 2007).

Alongside rapid growth, international schooling has seen a much-widened consumer base of both expatriate and local students seeking a globalised outlook and internationally recognised qualifications (Hayden & Thompson, 2008). International schools, and the qualifications they offer (such as the International Baccalaureate program), are increasingly seen as a status symbol and a marker of distinction, as much for local students as for expatriates (Gardner-McTaggart, 2018). There is an appeal especially for local elites who perceive domestic alternatives to be inferior (Hayden & Thompson, 2008) and for those aiming for overseas higher education (Ng, 2012). International schools often differentiate between themselves and their local counterparts and maximise the perceived relative prestige of attending their institution by framing their students as cosmopolitan global citizens (Berting, 2010; Garton, 2003; Reid & Ibrahim, 2017). These schools can take several forms, such as "Internationally British" or "Internationally American" (Wu & Koh, 2022, p. 57), referring to elements of practice or curricula used by the school, as well as the makeup of its staff. A growing minority of these schools, however, are the franchised versions of anglophone schools usually established in England (Bunnell et al., 2020).

The most comprehensive review of such schools is offered by Bunnell (2008a) and Bunnell et al. (2020), who suggest expansion of franchised international schools has occurred in three distinct waves. The first wave was characterised by "opportunistic and ad hoc" expansion (Bunnell, 2008a, p. 386), described as a form of hyper-capitalism. High-status schools expanded into low-risk markets, demonstrated by strong local demand for flourishing, independent international schools. Dulwich and Harrow's first expansions in 1996 and 1998 were followed by two more elite English schools, Bromsgrove and Shrewsbury, also in Thailand in 2002 and 2003.

The second wave moved from opportunism to systematic growth. Schools were pushed by financial pressures at home to look for new sources of revenue when the Charities Act of England and Wales 2006 threatened the charity status of private schools: schools now needed to prove they were working in the interest of the public good if they were to continue receiving tax breaks of more than £100 million between them (Bunnell, 2008a). This put pressure on schools to subsidise more places for low-income students in England. Subsequently, the second wave saw further growth and the involvement of lesser-known brands in new places, such as Repton School and Oxford High School for Girls in Dubai, and Haileybury schools in both Almaty and Astana, Kazakhstan.

A third wave, pushed by a growing global education industry, has been even more extensive, with a greater spread of 'second tier' cities and schools (Verger et al., 2017). A handful of American, Canadian, and Scottish schools have opened franchises, although the majority remain English. Openings in Chinese cities such as Qingdao, Suzhou, and Wuxi—as well as the opening of a Dulwich College in Yangon, Myanmar in

2018—reflect the reach of expansion beyond major cities, such as Beijing, Hong Kong, and Singapore (Bunnell et al., 2020). In 2019, the UK Department for International Trade knew of over 120 further overseas projects being considered by British schools (Jack, 2019). Concentrations of franchise schools found in the Middle East, Southeast Asia, and East Asia reflect regional variations in economic development, demand for English schooling, and the ease of establishing franchises (Hayden & Thompson, 2008). Figure 1 shows the extent of the growth of franchise schools globally between 1995 and 2019.

Figure 1.
Growth in franchise schools globally from 1995 to 2020.
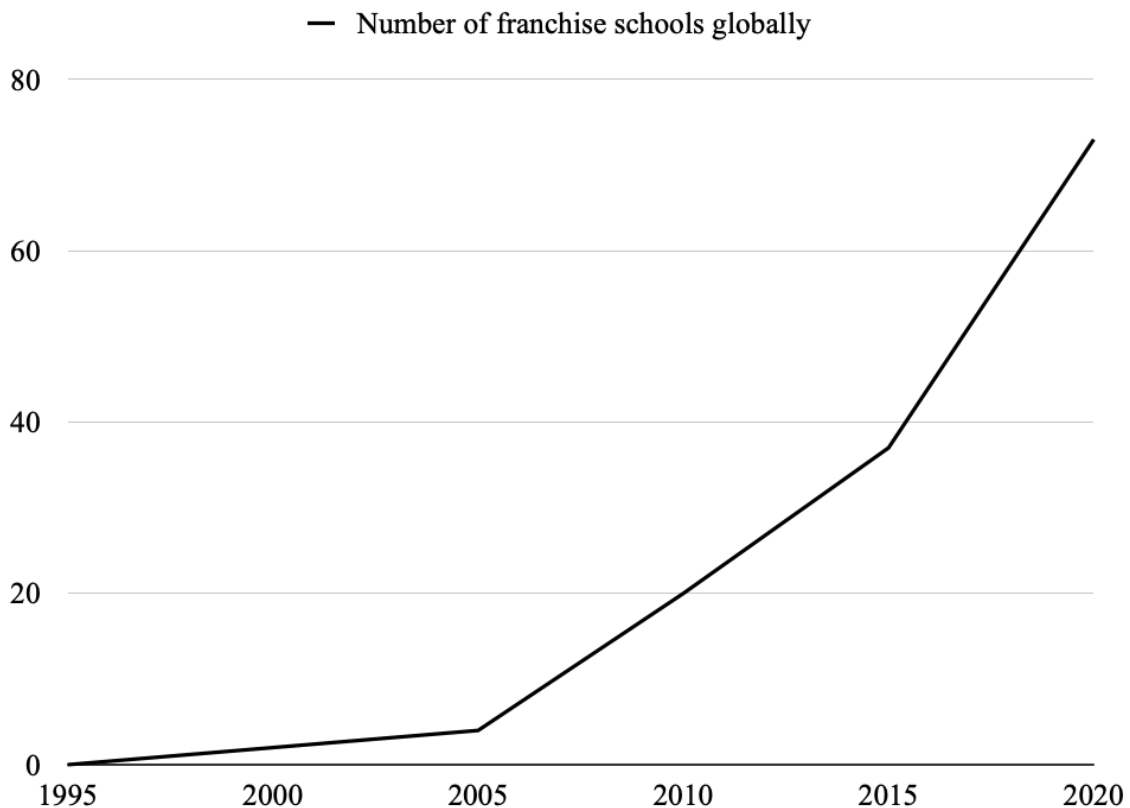
Source: Bunnell et al. (2020)

As the two pioneers of transnational school expansion, Dulwich and Harrow have had the weight of their histories and brand names behind them, with the cachet of their names allowing them to expand extensively. Both schools are members of the Headmasters' and Headmistresses' Conference (HMC), a group "comprising the oldest, richest and most prestigious schools" in the UK (Peel, 2021, p. 11). Harrow is also one of 18 members of the Rugby Group, as well as the even more prestigious Clarendon Commission of seven schools reformed by the Public Schools Act of 1868 (Bunnell et al.,

2020)[1]. As an indicator of the prestige and privilege of these schools, consider that "Clarendon school alumni remain 94 times more likely to take up an elite position [as measured by wealth, occupation, and/or influence on public life] than individuals attending other schools" (Reeves et al., 2017, p. 1160).
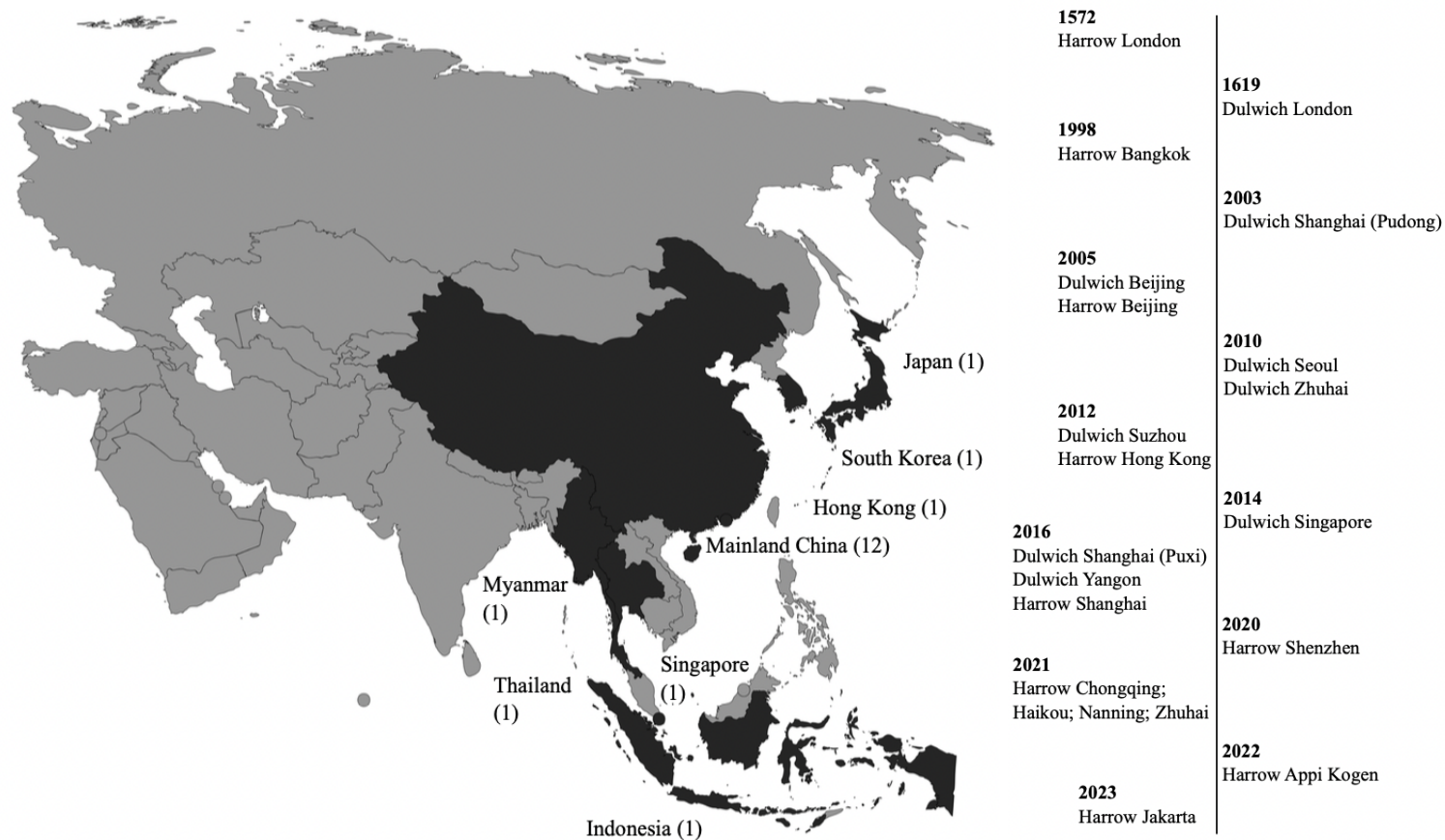
The Dulwich College International subsidiary currently manages nine schools in China, Myanmar, Singapore, and South Korea, having withdrawn its name from the original Phuket franchise in 2005 after management differences with its franchisee (Curtis, 2005; Dulwich College International, 2021). Harrow operates 10 schools in mainland China, Hong Kong, and Thailand, with new schools set to open in the ski resort of Appi Kogen, Japan in 2022, and in Jakarta, Indonesia in 2023 (Harrow School, 2021a). Harrow's strong presence in mainland China is in part the result of recent, rapid expansion, with the brand opening four new schools in 2021 alone, in Chongqing, Haikou, Nanning, and Zhuhai. Rather than the broader "Harrow International Schools," these schools operate under the "Harrow Innovation Leadership Academies" moniker, promoting an emergent, hybrid educational model that is bilingual and meets the requirements of both China's national curriculum and England's secondary qualifications (Harrow Schools, 2021). This further expands the reach of the Harrow brand beyond wealthy foreigners and expatriates to better include a growing Chinese middle class who might "aspire to a form of education perceived to be superior to the local alternative" (Hayden & Thompson, 2008, p. 47). The prestige of both Dulwich and Harrow has enabled them to expand extensively and to recruit both local and foreign students in various locations. Figure 2 shows the territories in which they operate franchises and a timeline of schools' opening years, demonstrating the extent, speed, and regional concentration of their expansion.

With their networks of schools continuing to grow, both Dulwich and Harrow have clear success marketing their franchises. Harrow's original expansion into Bangkok was described "as near an exact replica of Harrow [London] as can be achieved under local conditions" (Bunnell, 2008a, p. 385). Architectural emulation seems to be one way schools continue to establish or translate their status. Dulwich College Singapore's main building, for instance, appears almost identical to that of the founding Dulwich College in London, despite being built many hundreds of years later. Other franchise schools in mainland China adopt the style and even the uniform of their founding schools (Kong et al., 2020). In promotional materials, franchises place a strong emphasis on the history, status, academic reputation, and notable alumni of the founding school (such as former British Prime Ministers and members of the royal family). Images of traditional British architecture, British students in school uniform, and even the Union Jack are common (Wu & Koh, 2022).

---

[1] The term "public school" in the UK refers to private, fee-paying schools and is generally used to describe the older, more prestigious of such institutions. By contrast, publicly funded schools are referred to as "state schools".

Figure 2.
Countries/territories with franchise school locations of Dulwich College and Harrow School, with number of schools in brackets, and timeline of schools' founding dates.

Source: Data from Dulwich College International (2021), Harrow School (2021), AISL Harrow Schools (2021)

Indeed, schools' growing drive to market or present themselves in a particular way has not been limited to franchised expansion. Recent decades have seen the strengthening of market forces even within domestic, public education systems, where state marketisation comes into sharper relief against the notion of education as a public good (Adnett & Davies, 2002; Gorard & Fitz, 1998; Holmwood, 2012; Noden, 2000). The significance of school marketing materials in both public (Hesketh & Knight, 1998) and private systems (Gottschal et al., 2010; Wardman et al., 2010) has grown, with schools now investing more time and money in the "glossification" (Gewirtz et al., 1995, p. 127) of their image and some even employing marketing professionals to assist in this process (Symes, 1998).

Researchers have noted a convergence of the images commonly presented by schools: most include the school ethos, key statistics, and images of school life (Hesketh & Knight, 1998). In their promotional materials, elite schools strike difficult balances, such as between a focus on tradition and innovation (Symes, 1998), whilst international elite schools balance framing the student as a local community member and a global citizen (Tamatea et al., 2008). Overseas franchises appear keen to reference their founding schools, but English founding schools almost hide their international activity, writing of it only in hard-to-find corners of their websites. Instead, they discuss community involvement exclusively in terms of the local (Brooks & Waters, 2015).

International schools as enclosures of privilege: an analytical framework
I explore the similarities and differences in the marketing of two elite English schools, Dulwich and Harrow, across various locations in England and Asia. As an analytical lens, I employ Ingersoll's (2018) theory of international schools as elite educational enclosures which "protect and foster the mobility of elites who have the resources to gain access, or membership to the club" (p. 271), suggesting schools craft specific and deliberate boundaries between themselves and the societies in which they exist. The conceptualisation of the school as an 'enclosure' highlights the relationship between Dulwich and Harrow and both their home and host countries, and particularly how schools "symbolically position" (Ingersoll, 2018, p. 271) themselves within local and/or global communities across various locations. The analysis facilitated by this lens allows for an exploration of the way in which dominant forms of cultural capital (Bourdieu, 2018)—the ways of being and cultural knowledge so often crystallised and legitimised by educational credentials (Lowe, 2000)—travel and are translated transnationally. Local communities might include physical, local geographies and emphases on local culture, whilst global communities might represent connections within the brand's transnational network of schools, or a perhaps less tangible, more imagined global network of cosmopolitan, geographically mobile elites (Kenway, 2016). Access is often connected to elite education (Maxwell et al., 2017) and may be promoted in schools' own marketing materials. Prospective parents may look for a particular framing by way of distinguishing themselves from local alternatives (Hayden & Thompson, 2008) or with the goal of a pathway to international higher education (Wu & Koh, 2022).

Within the limits of the enclosure, a privileged few have access to educational advantages unavailable to others. Ingersoll et al. (2019) use this lens to highlight the tension between the competitive, exclusive commodification of international education and the "international-mindedness as an aspirational disposition" (p. 31) being

marketed within it. Similarly, Bunnell et al. (2020) describe a tension between the exclusivity and prestige of elite schools and their capitalist, transnational expansion widening access to them.

This paper examines how schools balance these tensions in their promotional materials and how they use the concept of the elite enclosure to maintain an image of privilege despite their expansion widening access to the brand name. Wu and Koh (2021) describe the way in which British franchises "market the offshore…schools as no different from their parent schools in England, burnishing [them] with all things British with symbols and paraphernalia that suggest 'distinction'" (p. 15).

The study and methodology
This study employed a qualitative case study design. Harrow and Dulwich were selected as the focus of this case study as two of England's oldest and most prestigious schools, and the two most extensive exporters of English schooling. Qualitative, textual analysis was used to understand how schools publicly frame, sell, and market themselves online. With this aim, schools' own websites are particularly telling; they "provide the advantage of being in the language and words of the [schools], who [have] usually given thoughtful attention to them" (Creswell, 2015, p. 222). A significant body of literature has explored the increasing pressure under which schools create and present curated images of themselves (Hesketh & Knight, 1998; Knight, 1992; Symes, 1998). Further, content analysis has been described as "particularly applicable to qualitative case studies… producing rich descriptions of a single phenomenon, event, *organisation*, or program" (Bowen, 2009, p. 29, emphasis added). Analysing webpages produced by each school reveals how they aim to present themselves to prospective parents and students.

Eleven of the 23 schools managed by the two brands at the time of writing were selected for analysis as examples of both brand's different models in various locations; this included a total of seven Harrow schools and six Dulwich schools (see Appendix 1), accessed and saved across three months between February and April of 2022. It was not possible to analyse all 23 schools due to capacity constraints. Schools were selected with the aim of creating a balanced sample, including franchises of various ages, as well as those both in 'emerging' economies, such as China and Thailand, and those in 'developed' economies, such as Japan and Singapore. The websites of schools are understood to have assumed much of the marketing and image-producing role previously held by the school prospectus (Gewirtz et al., 1995; Oplatka & Hemsley-Brown, 2012). Particularly as schools are both established in multiple places and advertised transnationally, the school website becomes a much more relevant resource than the spatially bound prospectus.

Collated text from each school site was printed and coded by hand, allowing the researcher to "be close to the data and have a hands on feel for it" (Creswell, 2015, p. 239). Codes— and analytic memos written after each pass of a website (Peshkin, 2000)—were then collected and compared in a single spreadsheet. The process was reflexive and the codebook was amended through subsequent passes of the data (DeCuir-Gunby et al., 2011).

The analysis combined a deductive and inductive approach; existing literature had an influence on the study's initial codes, whilst the data were still allowed to speak for themselves, keeping the study open to unexpected or surprising results (Miles et al., 2020). Initial codes were based on the study's theoretical lens, research questions, and existing literature exploring (franchised) international schools. Examples include reference to the founding school, the framing of both students and the school as either globally or locally embedded, and a focus on the school's offering of international qualifications and a pathway to international (anglophone) higher education. Emergent codes were then identified during a "preliminary exploratory analysis" of each school (Creswell, 2015, p. 242), with the study's codebook amended through subsequent passes of the websites (Miles et al., 2020). Codes were also revised after inter-rater reliability testing, in which a workshop of peers coded samples of data and offered feedback. Some emergent codes include the use of aggrandising language, emphasis on a holistic education, and the promotion of a hybrid model fusing local and international curricula and cultures.

Findings

Founding and franchise schools in various locations show both similarities and differences in their use of language and promotional emphases aimed at appealing to parents. These are seen, variously, across four key areas: the use of aggrandising language (or 'world-class' rhetoric); reference to the founding school's history, traditions, and notable alumni; emphasis on the prestige of qualifications offered and a pathway to elite higher education; and the framing of both students and schools as locally or globally embedded, or both. Differences reflect the franchise schools' various ages and establishment, the location in which each franchise operates, and the varying engagement of different franchise schools with local and international curricula.

The use of aggrandising language: hyperbole and exceptionalism through language

Coded as aggrandisements, the language of exceptionalism is seen throughout the websites of all schools studied. However, it is used slightly more frequently in franchise schools than it is in founding schools, perhaps as the latter are better-established within a centuries-old market for private schooling. Across the six Harrow franchise schools studied, an average of nine instances of aggrandising language were recorded per school, compared to the London founding school's seven. Dulwich franchises averaged eight uses of such language per school, also compared to the founding school's seven uses. This sort of language is used to describe almost everything, from the brands themselves, to individual school facilities and locations, and the achievement and higher education destinations of students. Qualifiers such as "the best" and "the most" are common, and their impact is further reinforced by aspects of the schools being frequently described as "state-of-the-art" (*Harrow Zhuhai*), "world-class" (*Dulwich Seoul*), "one of a kind" (*Harrow Appi*), "a once-in-a-lifetime opportunity" (*Dulwich Shanghai Pudong*), and "among the best the world has to offer" (*Harrow London*). In some yet stronger examples, one school's "commitment rests in world-class staff, world-class facilities, a complete and consistent adherence to the highest possible standards" (*Harrow Bangkok*), a student theatre is described as "a crucible for producing fearless original work of the highest dramatic order" (*Dulwich London*), and Harrow's oldest franchise school is "truly a magical place where your children will start on an educational journey that is hard to match" (*Harrow Bangkok*).

The use of this form of linguistic exceptionalism is common and is engaged in by founding and franchise schools alike. However, topics it is used for vary slightly. Younger newer Chinese franchises are more likely to use more and stronger aggrandisements to reinforce the prestige of the international qualifications and prospective higher education offered. For example, three Harrow schools in Haikou and Zhuhai suggest the English pre-university 'Advanced-level' courses offered to students aged 16 to 18 are "regarded as the gold standard in the British education system and recognised worldwide" (*Harrow Haikou, Zhuhai*). The same three schools describe the universities their students attend as "the most sought-after universities on the planet." Notably, older Harrow franchises in Bangkok and Beijing—as well as the new school in Appi, Japan due to open in 2022—offer the same qualifications but only mention them by name.

A linguistic device favoured by founding schools—and used up to four times more than newer franchise schools—is that of "archaic slang" (*Harrow London*), used to emphasise the exclusivity of being a part of the school community and understanding its ways. Franchise schools use this extremely rarely (and most not at all), almost always explaining it in parentheses immediately following its use. By contrast, Harrow London describes the way in which "employing inspiring Beaks is crucial," and only in a much later page of the website explains this term to the reader: "Around 20% of our beaks (teachers) have doctorates and many undertake their own writing and research" (*Harrow London*).

Reference to the founding school's heritage, traditions, and famous alumni
The long histories of the founding schools in London are clearly strong selling points for both the founding and franchise schools, although they are mentioned more frequently and described using more aggrandising language by the latter. Younger franchises particularly rely on the founding school history; older franchises have more of their own history to share. All schools are careful to refer to the connections between their initial establishment and the royal family of the UK. Dulwich London tells the story of its founding: "Dulwich College was founded by Edward Alleyn on June 21st, 1619, with letters patent from King James I. This magnificent document with the Great Seal of England still survives." Harrow London, "founded in 1572 under a Royal Charter granted by Queen Elizabeth I," uses a similar approach.

Franchise schools, whilst also emphasising these royal links, go further to connect the age of the founding school to tradition and school culture. Dulwich Beijing describes this connection:

> As a member school of the Dulwich College International family, we draw upon over 400 years of tradition and experience from our founding College in London…Our traditions and values form our culture and are firmly embedded in all that we do. They also build the sense of community and connect the school to past, present and future.

Many of the franchise schools studied centre the Englishness of such traditions: Harrow Bangkok is described as "a typical British day and boarding school education…providing a British style independent boarding school experience," later

affirming that "In a sense being a boarder is the most authentic way to experience a Harrow education; after all, Harrow London has been offering a boarding-only education for over 450 years" (*Harrow Bangkok*). Many focus on the prestige of those who have studied at the school: "Dulwich has a long-standing reputation for producing fine actors, musicians, sportsmen and writers; many of our students now go on to engage in entrepreneurial, technological, cybernetic and innovative enterprises too" (*Dulwich London*), whilst others specifically name some of those figures: "Amongst the school's alumni are some of the most influential figures in world history, including Lord Byron, Winston Churchill, Jawaharlal Nehru, King Hussein, Lord Rayleigh and numerous influencers, inventors, artists and Nobel Laureates" (*Harrow Appi*).

Although there is a significant focus on the heritage of the founding school and the influence of this on the franchises, all the schools studied attempted to strike a balance between history and innovation. This is best exemplified by two slogans used as headings across the websites of all sampled schools: Harrow schools use "Our past, your children's future," whilst Dulwich schools use "The future, founded in 1619." Harrow London further describes this tension: "While Harrow is, ostensibly, a traditional place, at its heart is a hunger for innovation. As our pupils' needs develop, so too does the organisation that surrounds them" (*Harrow London*). All the Dulwich franchises studied maintain that "The College has long been a pioneer in education," again balancing the prestige of heritage and the appeal of innovative practice.

Qualification prestige and the higher education pathway

A focus unique to the franchise schools studied is on the prestige of the English or international qualifications offered by the school and of the primarily anglophone universities attended by students after leaving. Again, aggrandising language is used to further convince parents of the advantage conferred by these privileges. More of such linguistic work is generally done by younger franchises, perhaps in places where the brand is less established, and the target market may be less familiar with the qualifications on offer. Harrow Bangkok, the oldest franchise school studied, only mentions that International General Certificate of Secondary Education (IGCSE) and Advanced ('A' level) courses are followed and that students achieve highly in them. By contrast, these same qualifications are described by one Harrow Haikou school as "highly regarded," "an excellent and academically meticulous preparation," and "the pinnacle of British school-level education" (*Harrow Haikou*).

Elite higher education is a significant focus of all the schools studied, with founding schools focused on UK institutions and only a brief nod towards elite US or other international universities. All the schools studied list specific institutions their students have attended. For franchise schools, "elite" higher education is coded largely as anglophone, with lists detailing almost 20 universities attended in the UK and US and under 10 universities in the Asia Pacific region. Almost all the schools in the sample take care to mention their offering of "bespoke" (*Harrow Zhuhai*) university counselling, which starts as early as age 16 to offer students support in writing personal statements, preparing for entrance tests, and practising for interviews.

Blending the local and global

Franchise schools are more likely to frame both themselves and their students as globally rather than locally embedded, further connecting students to international curricula and an international higher education pathway. However, some franchises make an effort to blend a framing of students as both local and global citizens.

Both brands have now opened numerous new schools in mainland China ("Harrow Innovation Leadership Academies" and "Dulwich International High Schools"), allowing students to complete the Chinese national curriculum during early secondary schooling, followed by international or English qualifications. This is contrasted by the "International Schools" offered by both brands, some also in mainland China, that offer only English or international curricula. The newer, mainland Chinese schools make more of an effort to market their hybrid educational model, "where pupils are educated to become successful and distinguished members of Chinese society, with a truly global outlook" and the school "creates a blend of East and West, where pupils can be proud of their heritage, but in touch with the world" (*Harrow Zhuhai*). The model is framed in terms of instilling an understanding and respect for both Chinese and British cultures, and it is often implied that students will return to China following their encouraged progression to anglophone higher education. Both Harrow Haikou schools use the following metaphor:

> At Harrow Haikou, we understand that good schools give their pupils roots and wings to be successful both academically and personally. Roots to know where home is and wings to fly away and use what they have learnt. At Harrow Haikou, our pupils' roots will be in the Chinese and British cultures, history, traditions and language brought together in a way that is uniquely 'Harrow'.

Harrow Zhuhai, similarly, is "passionately committed to developing students prepared to make a positive and purposeful contribution to society in China" (*Harrow Zhuhai*).

Dulwich schools, meanwhile, show considerable continuity between the websites of their various franchise schools—including between their "International Schools" and the hybrid model "International High School" in Zhuhai—to portray the connectedness both of its network and of its students. The schools appear more embedded within their own network, with more reference to other franchises and to inter-school events attended and hosted by different schools, such as the Dulwich Olympiad sporting competition. Dulwich uses this network integration to frame students as geographically mobile global citizens, seemingly by way of assuaging parents' concerns around the disruption of relocation. As is written on the website of each Dulwich franchise:

> Students from different Dulwich College International schools may get to know each other one year through a group event, and find themselves classmates the next when one of them has moved from, say, Dulwich College (Singapore) to Dulwich College Shanghai Pudong. Students facing the challenges of an international move will make a much smoother transition when their new school is so familiar.

Similarly, hybrid model schools often explicitly referred to themselves as such, making more of an effort to balance the history of the founding school and the Englishness of their qualifications with references to local culture. Harrow Haikou, for example,

describes the way in which its buildings are reminiscent of traditional Haikou balconies. Notably, this is almost the inverse of those schools that seek to emulate the architectural style of the English founding school (Kong et al., 2020), as was also exemplified in this study by Dulwich Singapore's main building and its striking resemblance to the centuries-old main building of Dulwich London—as well as early descriptions of Harrow's first expansion into Bangkok, said to be as similar to the London original as was possible (Bunnell, 2008a).

Although hybrid model schools in mainland China were more likely to refer to the importance of local culture alongside English and founding school traditions, there was considerable differentiation even among the more conventional "international schools" offering only English or international qualifications. Dulwich Singapore, Dulwich Seoul, and Harrow Appi all take care to mention aspects of local culture of significance to the school, where other "international schools" (including some in mainland China) do not. Dulwich Singapore mentions celebrating both Christmas and Lunar New Year, whilst Harrow Appi discusses the importance of respect for Japanese traditions. Dulwich Seoul was, notably, the "international school" with the most prevalent discussion of local culture, with the school referring to participation in *Chuseok* (the Korean harvest festival), a celebration of Hangeul Day, and the practice of Korean calligraphy. These local differences perhaps suggest Dulwich and Harrow believe local culture is of varying importance to consumers in different locations and adjust the balance of this framing against the prestige and history of the founding schools accordingly.

Discussion

The focus of franchise schools on the prestige of the founding school and its history, as well as on the benefits of studying English or international qualifications and the selling of an anglophone higher education pathway, echoes the findings of previous studies on various forms of international schooling (Hayden & Thompson, 2008; Wu & Koh, 2022). The use of aggrandisements to varying degrees and on different topics demonstrates that founding and franchise schools are contextually situated. They adapt to convince prospective parents of the relative prestige of their educational offering and to frame an enclosure of privilege (Ingersoll, 2018) from which their students will benefit. However, whilst franchised expansion occurs primarily through the more traditional "international school" model, it is now increasingly occurring through a hybrid model catering to both local and foreign curricula, further complicating the way in which schools communicate an image of privilege.

Aggrandising language and the image of privilege

The 'world-class' rhetoric that was seen throughout the websites studied, across both founding and franchise schools, suggests schools continue to place considerable importance on processes of image-building in their promotional materials (Hesketh & Knight, 1998; Symes, 1998). Indeed, this is perhaps yet more important when convincing wealthy parents in new locations of the merits of the brand's educational approach. Those schools advertising a boarding option transnationally must also convince some parents to send their children to school far away from their homes.

The linguistic exceptionalism used by all schools, and the "archaic slang" used by some, can be seen as examples of schools drawing boundaries between themselves and others, and managing consumers' impression that the school is a place of relative privilege. Newer schools perhaps feel a greater need to "symbolically position" themselves as places of privilege (Ingersoll, 2018, p. 271) by way of establishing the prestigious image of the founding school in a new market. It is perhaps with this same aim that newer franchise schools refer more to the founding school and its long history (Wu & Koh, 2022).

Aggrandising language is a key tool through which both founding and franchise schools establish themselves as places of relative privilege. With widely varying founding dates, degrees of establishment, sociocultural contexts, and global embeddedness, it is understandable that schools engage with this linguistic exceptionalism to varying degrees. However, its prevalence across school types and locations suggests that the global rhetoric for understanding and selling such schools is, in some ways, rather similar. This is one area in which the global education industry perhaps aligns across transnational boundaries (Bunnell et al., 2020; Verger et al., 2017).

Qualification prestige and the anglophone higher education pathway

Previous research suggesting the reputation of international qualifications and a pathway to anglophone higher education are considered key selling points by many international schools has been reinforced by this study. However, it is not just international qualifications, but English qualifications, too—such as IGCSEs and A-levels—that schools use particularly to sell the appeal of elite, English language schooling and higher education. In some franchise schools, especially those in China, the prestige of these qualifications was bolstered by explicit reference to English as the language of instruction. Franchise schools are perhaps keen to highlight the Englishness of both their qualifications and their instruction to differentiate themselves from local alternatives (Hayden & Thompson, 2008), and further draw a boundary between those inside and those outside of the school's enclosure of privilege (Ingersoll, 2018).

That the founding schools do not engage in the same framing of either their qualifications or higher education pathway again reflects that the schools studied position themselves as places of privilege within specific contexts. Founding schools cannot differentiate themselves through these qualifications or a pathway to English universities as both are largely the norm in the UK. However, they are sure to advertise the elite institutional destinations of their former students, such as Oxford and Cambridge universities (Reeves et al., 2017). For overseas franchise schools (and indeed in world rankings), there is considerable overlap between elite and anglophone higher education, although there are instances in which one takes precedence over the other, or vice versa. Whilst big, globally recognisable names are common, franchise schools also share the attendance of their students at lower-tier anglophone institutions, the names of which do not tend to appear on the websites of the English founding schools. Both founding and franchise schools focus on a pathway to elite higher education and the qualifications required to get there, and the status of English language higher education sometimes precedes the importance of elite rankings for franchise schools. The status of anglophone higher education in general overseas is such that some franchise schools

will share attendance at lower-tier institutions that founding schools would not publicise in the same way. Franchises sell both qualifications and a higher education pathway as an anglophone educational offering distinct to that available elsewhere and to that available to those outside of the school's enclosure (Ingersoll, 2018), for parents who might view them as superior to the local alternative (Hayden & Thompson, 2008) or to other international schools with less brand cachet (Bunnell et al., 2020). The prioritising of anglophone higher education above options with a better academic reputation suggests the impression of English language higher education remains a positive one.

Blending the local with the global by way of widening appeal

The development of the hybrid model further highlights the expansion of international schooling to include both local middle class and expatriate children (Gardner-McTaggart, 2018). This model echoes the Sino-Canadian schools studied by Wu and Koh (2021) in their provision to students of a "dual-track" and a "backup plan" (pp. 12-13) should they eventually decide against studying abroad—which may be an increasing challenge to franchise schools given Covid-related safety concerns and the deteriorating relationship between the US and China (Wu & Koh, 2021). Indeed, students at Harrow's hybrid model school in Haikou, but *not* those at the international school on the same site, have the option of taking the *Zhongkao* local secondary exam in addition to the English IGCSE exams. The model also has important implications for the framing of the schools and their students. Whilst previous research has suggested international schools look to distance themselves and their students from the local (Berting, 2010; Garton, 2003), or to balance framing their students as either global or local citizens (Tamatea et al., 2008), the hybrid model further complicates this distinction. Again, it might seem the enclosure of privilege (Ingersoll, 2018) is being constructed in a new way by hybrid model schools, where schools advertise privilege not only as distinct from the home society, but also within it.

Beyond the implications of the new hybrid model school, variations in conventional "international schools" remain interesting. The focus in particular of Dulwich Seoul on Korean culture is reminiscent of the way in which globalisation has developed in South Korea not to the demise of nationalism, but to its continued importance; South Korea perhaps presents a culturally unique context for the operation of a franchise school, in which the school is more required to be cognisant of "the curious mixture of two seemingly contradictory forces, nationalism and globalization" (Shin, 2003, p. 6).

Brands can be seen engaging with local and foreign/global cultures to varying degrees in different places. It is perhaps the case that enclosures of privilege (Ingersoll, 2018) are conceptualised differently in different cultures; some might place greater importance on an international outlook, whilst others might have a stronger drive to preserve local culture. Franchise schools engage in a complex balancing act in determining the framing of themselves, their students, and the educational offering they provide. The comparison between founding schools and their various franchises provides insight into the complexities behind the maintenance of privilege across transnational boundaries. Although they began as individual institutions within the UK, as these educational brands continue to grow, their idiosyncrasies will further suggest local differences in consumers' perceptions of what it means to have an "elite" education.

Conclusion

Franchised exports of primarily English schools make up a growing portion of the international schools market, with almost 100 of such schools opening globally in the past quarter of a century. Harrow School and Dulwich College were the first schools to expand and today have the most extensive networks, concentrated thus far in Southeast Asia and East Asia. This study seeks a novel comparison of the centuries-old founding schools and their much younger franchise counterparts, adding to an emergent body of literature analysing the ways in which heritage, status, and longstanding reputations are translated across various contexts (Brooks & Waters, 2015; Bunnell et al., 2020).

The conceptual framework of international schools as enclosures of privilege (Ingersoll, 2018) demonstrates how expanding school brands adapt the framing of themselves depending on the age and establishment of a franchise. Younger franchises are more likely to use 'world-class' rhetoric and to refer more often to the prestige and history of the founding school, demonstrating a need to establish themselves as places of privilege in new settings. Both founding and franchise schools advertise a pathway to elite higher education, although the latter implicitly code this as almost exclusively anglophone and often give little attention to local alternatives. The sociocultural context of a franchise school is also of important influence. Some contexts, such as Japan, Singapore, and South Korea, require the school to devote more time and energy to local culture, whilst schools portray a more international or global version of themselves and their students in other contexts, such as Thailand. The emergent hybrid model of international schooling, catering to the requirements of both local and international curricula, is being used by some—but not all—franchise schools in mainland China. This model of school again places a greater importance on local culture, whilst also framing itself and its students as both locally and globally embedded.

This study presents a starting point for the focused exploration of expansionist schools and their franchises. Whilst Harrow and Dulwich have the most extensive networks of schools, other concentrations of franchise schools warrant attention, particularly in the Middle East. Further, the data used in this paper provide only one perspective. The study of school promotional materials tells us only how schools intend to portray themselves to parents and students; it does not explore how this image is interpreted by consumers. Future research might both include other brands of schools in other places and triangulate data sources (Creswell & Creswell, 2018) to understand not just how schools present themselves, but how they are perceived.

Further study will also depend on host country approaches and shifting focal points in expansion. The past decade has seen the rapid growth of franchise schools in mainland China, largely due to economic growth and rising demand. However, recent reports suggest a shift in authorities' attitudes. In 2019, the Chinese education bureau announced that any oversubscribed school would be required to run a lottery for places (Turner, 2019), but this was not enforced. More recently, in April 2022, the bureau announced that education providers would no longer be allowed to carry the name of a foreign institution (Langley et al., 2022). A letter sent to parents at Harrow Beijing said the school would refer to itself in future communication by the name "Lide," although it

remains to be seen how the policy might affect the brand's international and online marketing of its Chinese schools, which continue to be branded as Harrow schools.

A volatile policy landscape is now shifting the focus of expansionist school brands. Westminster, another Clarendon Commission school, recently abandoned plans to open six Chinese franchises (Jack, 2021), whilst Harrow recently announced four new schools in India and one in the US (Harrow School, 2021b). With such varied economic and sociocultural contexts and changing policy landscapes, it will be interesting to see not just how Harrow positions itself within these new locations, but how it—and other franchise schools in mainland China—will continue operation. As expansionist schools enter an increasingly diverse array of contexts, the continued maintenance and communication of their privilege will present fruitful grounds for future study.

Stefano Hollis *is a teacher and sociologist from London, UK. He has taught social sciences and English across a range of ages in London, Hong Kong, and mainland China. His research interests include the global marketisation of education, transnational franchised school expansion, and the social role of higher education.*

References

Adnett, N., & Davies, P. (2002). Education as a positional good: Implications for market-based reforms of state schooling. *British Journal of Educational Studies, 50*(2), 189–205.

AISL Harrow Schools. (2021, December 8). *AISL Harrow Schools.* AISL Harrow Schools. https://www.harrowschools.com/

Becker, R. (2010). International branch campuses: New trends and directions. *International Higher Education, 2010*(58), 3–5.

Berting, R. (2010). From local or international to colloquial or cosmopolitan—Refining how we look at the populations of international schools. *International Schools Journal, 29*(2), 30–35.

Blanch, W. H. (1877). *Dulwich College and Edward Alleyn: A short history of the foundation of God's Gift College at Dulwich*. W. Allen.

Bourdieu, P. (2018). The forms of capital. In *The sociology of economic life* (pp. 78-92). Routledge.

Bowen, G. A. (2009). Document analysis as a qualitative research method. *Qualitative Research Journal, 9*(2), 27–40.

Brooks, R., & Waters, J. (2015). The hidden internationalism of elite English schools. *Sociology, 49*(2), 212–228.

Brummitt, N. (2007). International schools: Exponential growth and future implications. *International Schools Journal, 27*(1), 35–40.

Bunnell, T. (2008a). The exporting and franchising of elite English private schools: The emerging "second wave." *Asia Pacific Journal of Education, 28*(4), 383–393.

Bunnell, T. (2008b). International education and the "second phase": A framework for conceptualizing its nature and for the future assessment of its effectiveness. *Compare: A Journal of Comparative and International Education, 38*(4), 415–426.

Bunnell, T., Courtois, A., & Donnelly, M. (2020). British elite private schools and their overseas branches: Unexpected actors in the global education industry. *British Journal of Educational Studies, 68*(6), 691–712.

Creswell, J. W. (2015). Revisiting mixed methods and advancing scientific practices. In S. Hesse-Biber & R. Johnson (Eds.), *The Oxford handbook of multimethod and mixed methods research inquiry* (pp. 61–71). Oxford University Press.

Creswell, J. W., & Creswell, J. D. (2018). *Research design: Qualitative, quantitative, and mixed methods approaches*. SAGE.

Curtis, P. (2005, May 18). *Dulwich pulls out of Thai partnership*. The Guardian. https://www.theguardian.com/education/2005/may/18/schools.uk?CMP=gu_c om/

DeCuir-Gunby, J. T., Marshall, P. L., & McCulloch, A. W. (2011). Developing and using a codebook for the analysis of interview data: An example from a professional development research project. *Field methods, 23*(2), 136–155.

Dulwich College International. (2021, November 18). *Dulwich College International - international schools and colleges in China, Singapore, Seoul and Yangon*. Dulwich College International. https://www.dulwich.org/

Farrugia, C. A., & Lane, J. E. (2013). Legitimacy in cross-border higher education: Identifying stakeholders of international branch campuses. *Journal of Studies in International Education, 17*(4), 414–432.

Gardner-McTaggart, A. (2018). The promise of advantage: Englishness in IB international schools. *Perspectives: Policy and Practice in Higher Education, 22*(4), 109–114.

Garton, B. (2003). International schools and their wider community: The location factor. In M. Hayden, J. Thompson, & G. Walker (Eds.), *International education in practice* (pp. 131–141). Routledge.

Gewirtz, S., Ball, S. J., & Bowe, R. (1995). *Markets, choice and equity in education*. Open University Press.

Gorard, S., & Fitz, J. (1998). The more things change… The missing impact of privatisation? *British Journal of Sociology of Education, 19*(3), 365–376.

Gottschall, K., Wardman, N., Edgeworth, K., Hutchesson, R., & Saltmarsh, S. (2010). Hard lines and soft scenes: Constituting masculinities in the prospectuses of all-boys elite private schools. *Australian Journal of Education, 54*(1), 18–30.

Harrow School. (2021a, November 18). *Harrow Family of Schools*. Harrow School. https://www.harrowschool.org.uk/harrow-family-of-schools/

Harrow School. (2021b, September 8). *New Harrow international schools planned for India and New York*. Harrow School. https://www.harrowschool.org.uk/post/~board/latest-news/post/new-harrow-international-schools-planned-for-india-and-new-york

Hayden, M., & Thompson, J. (1995). International schools and international education: A relationship reviewed. *Oxford Review of Education, 21*(3), 327–345.

Hayden, M., & Thompson, J. (2008). *International schools: Growth and influence*. UNESCO International Institute for Educational Planning.

Healey, N. (2015). Managing international branch campuses: What do we know? *Higher Education Quarterly, 69*(4), 386–409.

Hesketh, A. J., & Knight, P. T. (1998). Secondary school prospectuses and educational markets. *Cambridge Journal of Education, 28*(1), 21–35.

Holmwood, J. (2012). Education: From a public value to a positional good. In L. Coiffait (Ed.), *Blue skies: New thinking about the future of higher education. A collection of short articles by leading commentators* (pp. 46–48). Pearson.

Ingersoll, M. (2018). Uncommon knowledge: International schools as elite educational enclosures. In K. Saltman & A. Means (Eds.), *The Wiley handbook of global educational reform* (pp. 259–281). Wiley Blackwell.

Ingersoll, M., Sears, A., Hirschkorn, M., Landine, J., & Kawtharani-Chami, L. (2019). What is it all for?: The intentions and priorities for study abroad in Canadian teacher education. *Global Education Review, 6*(3), 30–48.

Jack, A. (2019, November 18). *Welcome to the very English private school... In Shanghai.* Financial Times. https://www.ft.com/content/c89baa6a-763e-11e9-bbad-7c18c0ea0201/

Jack, A. (2021, November 2). *Westminster School scraps plans for linked institutions in China*. Financial Times. https://www.ft.com/content/bee549c5-39c4-48c8-abf3-6bd3e7e14bcc

Kenway, J. (2016). Travelling with Bourdieu: Elite schools and the cultural logics and limits of global mobility. In *Bourdieusian Prospects* (pp. 43-60). Routledge.

Knight, P. (1992). Secondary schools in their own words: The image in school prospectuses. *Cambridge Journal of Education*, 22(1), 55–67.

Kong, L., Woods, O., & Zhu, H. (2020). The (de)territorialised appeal of international schools in China: Forging brands, boundaries and inter-belonging in segregated urban space. *Urban Studies, 59*(1), 242–258.

Kosmützky, A., & Putty, R. (2016). Transcending borders and traversing boundaries. *Journal of Studies in International Education, 20*(1), 8–33.

Lane, J. E. (2011). Global expansion of international branch campuses: Managerial and leadership challenges. *New Directions for Higher Education, 2011*(155), 5–17.

Langley, W., Staton, B., & Olcott, E. (2022, May 15). *Harrow Beijing school loses its hallowed British branding*. Financial Times. https://www.ft.com/content/848bd279-0039-487c-9100-6ee47446df7d

Lowe, J. (2000). International examinations: The new credentialism and reproduction of advantage in a globalising world. *Assessment in Education: Principles, Policy & Practice*, 7(3), 363-377.

Machin, D. (2017). The great Asian international school gold rush: An economic analysis. *Journal of Research in International Education, 16*(2), 131–146.

Maxwell, C., Deppe, U., Krüger, H. H., & Helsper, W. (Eds.). (2017). *Elite education and internationalisation: From the early years to higher education*. Springer.

Merola, R. (2016). How international branch campuses stand out from the crowd. *International Higher Education, 87*, 11–12.

Miles, M. B., Huberman, A. M., & Saldaña, J. (2020). *Qualitative data analysis: A methods sourcebook* (4th ed.). SAGE.

Ng, V. (2012). The decision to send local children to international schools in Hong Kong: Local parents' perspectives. *Asia Pacific Education Review, 13*(1), 121–136.

Noden, P. (2000). Rediscovering the impact of marketisation: Dimensions of social segregation in England's secondary schools, 1994–99. *British Journal of Sociology of Education, 21*(3), 371–390.

Oplatka, I., & Hemsley-Brown, J. (2012). The research on school marketing: Current issues and future directions—An updated version. In I. Oplatka & J. Hemsley-Brown (Eds.), *Advances in educational administration* (pp. 3–35). Emerald Group Publishing Limited.

Pearce, R. (2013). *International education and schools: Moving beyond the first 40 years*. A&C Black.

Peel, M. (2021). *The new meritocracy: A history of UK independent schools 1979–2020*. Lume Books.

Peshkin, A. (2000). The nature of interpretation in qualitative research. *Educational researcher*, *29*(9), 5–9.

Reeves, A., Friedman, S., Rahal, C., & Flemmen, M. (2017). The decline and persistence of the old boy: Private schools and elite recruitment 1897 to 2016. *American Sociological Review, 82*(6), 1139–1166.

Reid, C., & Ibrahim, M. K. (2017). Imagining the cosmopolitan global citizen? Parents' choice of international schools in Kuwait. In S. S. Choo, D. Sawch, A. Villanueva, & R. Vinz (Eds.), *Educating for the 21st century: Perspectives, policies and practices from around the world* (pp. 265–279). Springer.

Shin, G. W. (2003). The paradox of Korean globalization. *Asia/Pacific Research Center, Stanford.*

Symes, C. (1998). Education for sale: A semiotic analysis of school prospectuses and other forms of educational marketing. *Australian Journal of Education, 42*(2), 133–152.

Tamatea, L., Hardy, J., & Ninnes, P. (2008). Paradoxical inscriptions of global subjects: Critical discourse analysis of international schools' websites in the Asia–Pacific region. *Critical Studies in Education, 49*(2), 157–170.

Turner, C. (2019, October 1). *China is growing fed up with British private schools 'creaming off' the best pupils, headteachers warned*. The Telegraph. https://www.telegraph.co.uk/news/2019/10/01/china-growing-fed-british-private-schools-creaming-best-pupils/

Tyerman, C. (2000). *A history of Harrow School, 1324–1991*. Oxford University Press on Demand.

Verger, A., Steiner-Khamsi, G., & Lubienski, C. (2017). The emerging global education industry: analysing market-making in education through market sociology. *Globalisation, societies and education*, *15*(3), 325-340.

Wardman, N., Hutchesson, R., Gottschall, K., Drew, C., & Saltmarsh, S. (2010). Starry eyes and subservient selves: Portraits of 'well-rounded' girlhood in the prospectuses of all-girl elite private schools. *Australian Journal of Education*, *54*(3), 249–261.

Wilkins, S., & Huisman, J. (2012). The international branch campus as transnational strategy in higher education. *Higher Education, 64*(5), 627–645.

Wilkins, S., & Huisman, J. (2015). Factors affecting university image formation among prospective higher education students: The case of international branch campuses. *Studies in Higher Education, 40*(7), 1256–1272.

Wu, W., & Koh, A. (2022). Being "international" differently: A comparative study of transnational approaches to international schooling in China. *Educational Review, 74*(1), 57–75.

Appendix

Table A1. Websites for analysis.

Brand	School Location	Website (Homepage)
Harrow	London, UK	https://harrowschool.org.uk
	Appi Kogen, Japan	https://harrowappi.jp
	Bangkok, Thailand	https://harrowschool.ac.th
	Beijing, China	https://harrowbeijing.cn
	Haikou ("Harrow International School"), China	https://harrowhaikou.cn/his/
	Haikou ("Harrow Innovation Leadership Academy"), China	https://harrowhaikou.cn/hila/
	Zhuhai, China	https://harrowzhuhai.cn
Dulwich	London, UK	https://dulwich.org.uk/
	Beijing, China	https://beijing.dulwich.org
	Seoul, South Korea	https://seoul.dulwich.org
	Shanghai Pudong, China	https://shanghai-pudong.dulwich.org
	Singapore	https://singapore.dulwich.org
	Zhuhai, China	https://zhuhai-high-school.dulwich.org/

More girls are accessing school, but are they learning? An exploratory study of the factors influencing girls' mathematics achievement in Pakistan

Sumit Karn
Teachers College, Columbia University

Vandita Churiwal
Teachers College, Columbia University

Chris Henderson
Teachers College, Columbia University

Mia Chin
Teachers College, Columbia University

Shreya Sanjeev
Teachers College, Columbia University

Although primary school enrollment in Pakistan has increased in the last two decades, schooling quality for girls and boys remains a central challenge. Furthermore, strides made toward gender parity are yet to address pervasive inequities in schooling outcomes. To provide insight on this matter, this paper interrogates girls' achievement in mathematics within the broader context of girls' access to quality schooling, asking: to what extent does gender influence mathematical achievement among grade four students in Pakistan? Building on Sen and Nussbaum's 'capability approach' and 'freedom as development' frameworks, we explore the extent to which girls' educational achievement represents what Nussbaum defines as 'instrumental freedom.' We conducted an OLS regression to analyze Pakistan's TIMSS 2019 data to examine the effect of gender on mathematical achievement. Results show that despite overall inequity in access to education for female students, girls outperform boys. However, while mathematics achievement might contribute to instrumental freedoms via the attainment of numeracy, discriminatory gender norms deny a vast majority of Pakistan's girls and young women the substantive freedoms central to their development. In Pakistan, the reality that young women are still 75 percent more likely to be disengaged from further education or employment presents a missed opportunity and significant cause for concern.

Keywords: Gender equity, girls achievement, sense of belonging, mathematics education, large-scale assessments, quality teaching.

Introduction

Between 1990 and 2019, the expected years of schooling in Pakistan increased from 4.6 to 8.3 years, and the mean years of actual schooling increased from 2.3 to 5.2 years (UNDP, 2019). While 59 percent of the net attendance ratio is obtained at the primary level, this number reduces to 38 percent by the middle and secondary levels (DHS, 2017). Although primary school enrollment in Pakistan has increased overall, schooling quality remains a stubborn challenge. For example, Pakistan experiences 'learning poverty' with approximately 48 percent of all children being unable to read or comprehend written text by age ten (World Bank, 2019). In addition to early-grade reading, mathematics skills are foundational for academic success in upper primary and secondary education as well as adult engagement in political and economic spheres (Sitabkhan & Platas, 2018). The importance of increased mathematics skills is also associated with increased individual earnings later in life (Hanushek, 2015). To date, however, there is limited longitudinal and/or comparable data or analysis on mathematics achievement in Pakistan.

One barrier towards progress is that data on mathematics achievement in lower and upper levels of schooling has been inadequately captured. For example, we have been able to access gender disaggregated data on regional youth reading rates for 15–24-year-olds for some time (indicating a pervasive gender gap in favor of males). However, until Pakistan participated in the 2019 Trends in International Mathematics and Science Study (TIMMS) we lacked gender-disaggregated data on achievement in mathematics at both primary and secondary school levels (UNICEF & UNFPA, 2019). Representing an anomaly in global mathematics achievement trends (Ghasemi & Burley, 2019), we now know that grade four girls in Pakistan perform better on average than boys. Despite boys experiencing more variability in scores and a poorer overall average score, boys are better represented at higher levels of achievement in mathematics than girls (TIMMS, 2019; UNESCO GEM, 2022).

Our ability to meaningfully evaluate the degree to which improved parity of access to schooling for girls in Pakistan - which is 0.90 at the primary level - accompanies comparable academic achievement is limited (UNICEF & UNFPA, 2019). As such, we are interested in the issue of girls' achievement in mathematics within the broader context of girls' access to quality schooling. Specifically, we want to know what this represents regarding broader aspirations for gender parity in global education access and outcomes (see Sustainable Development Goal (SDG) 4.1). This paper uses data from the TIMMS 2019 assessment to produce initial and exploratory insights to focus on the factors influencing girls' mathematics achievement in Pakistan.

We are also motivated by a dearth of evidence on mathematics achievement in the South Asia region more generally (Sitabkhan & Platas, 2018). For this reason, our paper addresses a prevalent knowledge gap in the field and analyzes the extent to which, if at all, gender influences students' mathematics learning outcomes in Pakistan. To better understand the constellation of factors influencing mathematics achievement, we interrogate the extent to which home-life and school-life factors have a bearing on girls' mathematics achievement. To answer this question, we employ an ordinary least squares regression analysis of the dependent variable of 'learning achievement in mathematics'

with four independent variables of 'gender,' 'parental involvement in education,' and 'resources at home' (as proxies for home-life factors), and 'clarity of teaching instruction' and 'student sense of belonging' (as proxies for school-life factors).

Literature review
Over the past two decades, numerous Western governments have positioned girls' education at the forefront of their bilateral aid and development agendas. For example, since 2012, the United Kingdom's Foreign Commonwealth Development Office (FCDO) has funded the Girls' Education Challenge (GEC) to the tune of £400-£600 million per year (The Guardian, 2020). Likewise, multilateral and philanthropic agencies, such as UNICEF, Plan International, and the Malala Fund, have forefronted girls' education to promote and uphold education's promise for girls' lives. Moreover, such agencies broadly promote educated women's role in community and national development, climate change mitigation, and peacebuilding.

As Pakistani scholar Khoja-Moolji (2018) critiques in *"Forging the Ideal Educated Girl: The Production of Desirable Subjects in Muslim South Asia''*, development-sector discourse on girls' education in the Global South places girls "on the precipice of failure" if not saved by the promise of education (p.120). This promise, Khoja-Moolji believes, is accompanied by the economic rationalization that "educated girls will be able to enter the labor force, pull themselves out of poverty, and contribute to national GDP" (p.5). The South Asian girl thus becomes "an actively charged figure" upon whom calls for projects, funds, and reforms are placed for herself, her family, and her community, thereby "legitimizing myriad state and non-state interventions" on their behalf (p.9).

Across South Asia, steady strides have been made toward gender parity in access to education. For example, with only 34 percent of girls in the region attending primary school in the year 2000, by 2020 just over 60 percent attended school, representing a 26 percent increase and a rate of access to primary school comparable to boys (World Bank, 2020). However, in tension with this reality, young women in South Asia are less likely than young men to engage in further employment, education, or training (UNICEF & UNFPA, 2019). Highlighting this fact, only 21.9% of all women participate in Pakistan's formal labor market (UNDP, 2019).

Obscured by regional averages, statistics for girls' and women's low levels of participation in further education or employment are more pronounced in Pakistan due to gender-based discrimination, which is more widespread than in Sri Lanka or the Maldives (UNICEF & UNFPA, 2019). In addition, the scarcity of female teachers at higher levels of Pakistan's education system also means that there is a lack of female role models for girls, which contributes to a poor sense of belonging in school and can "reinforce norms that undermine girls' academic achievement" in higher education or employment (UNICEF & UNFPA, 2019. p. 78). Therefore, girls continue to face barriers in school retention and experience lifelong challenges to fully participate in Pakistan's social and economic development.

With a national population of 220 million and 22.5 million children not enrolled in formal schooling (representing 10.2 percent of the total population), Pakistan has the second highest rate of out-of-school-children (OOSC) in the world, of which 55 percent

or 12.3 million are girls (World Bank, 2019). The Government of Pakistan (GoP) is thus committed to "strengthening human and social capital, which will allow the population to contribute to and effectively benefit from economic growth" (OSF, 2012). Through Article 25A of the Constitution, Pakistan provides "free and compulsory education to all children of the age of five to sixteen years in such manner as may be determined by law" (DHS, 2017).

Across primary, middle, and secondary school levels, children from the highest wealth quintile have the highest net attendance ratio compared to children from the lowest (DHS, 2017). Therefore, Pakistan's Demographic and Health Services (DHS) (2017) highlights how students in urban areas and wealthier quintiles are more likely to be enrolled in school. For example, 42.3 percent of males from the lowest wealth quintile attend primary school compared to 74.7 percent from the highest quintile. By comparison, only 30.2 percent of females from the lowest quintile attend primary school, and 72.6 of females from the highest (DHS, 2017). With these facts in mind, it is important to note the limited cross-section of Pakistan's children represented in the TIMSS 2019 survey sample.

Regarding the factors that improve girls' access to quality education, teachers are known to be one of the most important school-level inputs for student learning outcomes and a sense of belonging (Lovenheim & Turner, 2018). However, especially in low- and middle-income country contexts, the quality and uniformity of teaching vary greatly. Teacher effectiveness depends on teachers' access to pre-service and in-service continued professional development, as well as quality teaching and learning materials (GEEAP, 2020). Since 2016, however, Pakistan's percentage of fully trained teachers has declined from 88 percent to 77 percent (World Bank, 2021).

In high-income countries, parental involvement in learning is a key home-level determinant in student achievement, which is known to have a positive effect on children's learning and development outcomes (Coleman, 1966; Muller, 2018). Findings from low- and middle-income settings are more mixed, as this study highlights (Kim, 2018). Children born into households where parents are experiencing poverty or other forms of social instability experience adverse effects of parental involvement (Kim, 2018). To address the challenges above, and as we outline in more detail below, findings from this literature review and the current availability of TIMSS 2019 data for Pakistan inform the thematic focus of our study: "*More girls are accessing school, but are they learning? The factors influencing girls' mathematics achievement in Pakistan.*"

Research question:
To what extent does gender influence mathematical achievement among grade 4 students in Pakistan?
> *Dependent Variable:* score_math (Mathematics learning outcomes)
> Independent: female (gender)
> *Predictor variables:* Parental involvement (par_involve), Home resources
> (hm_resources), clarity of instruction in schools (clarity_inst), and student sense
> of belonging (belonging)

Data and methods
Definitions of variables:
The TIMSS assessment data capture grade 4 and 8 student performance in mathematics, science, and other schools, student, and household characteristics. The following definitions represent the specific variables employed for this study:

- Mathematics Learning Outcome: A dependent variable providing the mathematics achievement of grade four students in Pakistan.
- Female: An independent variable identifying students' biological sex as 'male' or 'female.'
- Parental Involvement in Children's Education: A predictor variable describing parents' assistance and support to their children in informal learning.
- Resources at Home: A predictor variable depicting socioeconomic status with the potential to facilitate student learning.
- Clarity of Instruction: A predictor variable capturing teachers' effectiveness and capacity to provide clear instruction.
- Sense of Belonging: A predictor variable referring to students' sense of belonging and connectedness to school.

Table 1
Definitions of variables as described by TIMSS 2019

Variable	Analytical Category (per our analysis)	Type	Code
Mathematics Learning Outcome	-	Dependent variable	ASMMAT01 = score_math

TIMSS 2019 aims to provide a comprehensive picture of the mathematics achievement of grade four students in each participating country. This includes achievement in each of the content domains (Number = 50%; Measurement and Geometry = 30%; Data = 20%) and cognitive domains (Knowing = 40%; Applying = 40%; Reasoning = 20%) (Martin and Mullins, 2017, p. 14) as overall mathematics achievement.

Female	Identity	Independent variable (Ordinal variable)	ITSEX = female

Identification of a student based on their biological sex as either 'male' or 'female.'

Parental Involvement	Home life	Predictor variable (Categorical variable)	ACBG14E = par_involve

Parental involvement is defined as assistance and support parents give to their children in all forms of informal learning and teaching practice related to school (Alreshidiet al., 2021). It is measured through the *School Questionnaire* specifically under Question 14 where students are asked how they characterize parental involvement in school activities (Fishbein et al., 2020, p. 99).

Resources at Home	Home life	Predictor variable (Categorical variable)	ASDGHRL = hm_resources

Socioeconomic status is often indicated through proxy variables. TIMSS 2019 developed two scales that expand upon the classic conception of socioeconomic status to home resources with the potential to facilitate student learning. The grade four TIMSS *Home Resources for Learning* scale is based primarily on data derived from the home questionnaire (Martin and Mullins, 2017, p. 64). Students were scored according to their own and their parents' reports regarding the availability of five resources on the scale in Exhibit 5.1 (Martin et al., 2020).

Clarity of Instruction	School life	Predictor variable (Continuous variable)	ASBGICM = clarity_inst

The TIMSS 2019 student and teacher questionnaires include instructional clarity, which captures a teacher's effectiveness and capacity to provide clear instruction (i.e., the clarity with which teachers convey the curriculum to students). Students were asked about aspects of teachers' mathematics instruction during their mathematics lessons: whether they know what their teacher expects them to do, and whether their teacher is easy to understand, has clear answers to their questions, is good at explaining mathematics, does a variety of things to help the students learn, and explains a topic again when the students do not understand. Responses were combined into the TIMSS *Instructional Clarity in Mathematics Lessons* scale, as described in Exhibit 12.8 (Martin et al., 2020)

Student Sense of Belonging	School life	Predictor variable (Continuous variable)	ASBGSSB = belonging

Students' sense of belonging, also referred to as school connectedness, by TIMSS 2019, broadly encompasses the notion that students who feel more attached to their school also tend to report greater enjoyment in learning and greater confidence in their capabilities (Martin and Mullins, 2017, p. 68). The items forming the *Sense of School Belonging* scale asked students about their attitudes toward school, including the extent to which they like being in school, feel that they belong, and have good relationships with teachers. Fourth grade students were asked how much they agreed or disagreed with the five statements listed in Exhibit 7.9 (Mullins et al., 2020).

Summary of statistics for variables:
In table 2, we present a summary statistics for the variables: mathematics learning outcome, gender, parental involvement, resources at home, clarity of instruction, and sense of belonging, based on a sample of 3,448 grade four students in Pakistan who participated in TIMSS 2019. Forty-six percent of the students were female. For question items relating to achievement in math, out of a maximum of 1000 points, the mean score was 322.70 with a standard deviation of 99.97. This is the second lowest score among participating nations after the Philippines (mean score = 297). There was a range of 677.42 points between the highest and lowest scores. Finally, for parental involvement, 20 percent of students scored very low parental involvement, 22 percent of students had low involvement, 26 percent of students had medium involvement, 13 percent of students had high involvement, and the remaining 19 percent of students had very high involvement. The standard deviation of parental involvement was 1.38. A minimum score of 1 and a maximum score of 5 provided a range of 4 points in parental involvement. For the variable of resources at home, which was a composite of five

separate socio-economic status question items in the TIMSS student survey, 33 percent had few resources at home, 67 percent had some resources at home, and the remaining 23 percent had many resources at home, with a standard deviation of 0.49. The variable for clarity of instruction scored a mean of 10.20, with a standard deviation of 2.34, with a low score of 2.55 and a high score of 12.75, and a range of 9.70 points. For students' sense of belonging in school, the mean score was 11, with a standard deviation of 2.25. There was a range of 9.61 points, with the lowest score of 3.14 and a high score of 12.75.

Table 2
Summary Statistics for Gender, Resources at Home, Sense of Belonging, Clarity of Instruction, Parental Involvement and Achievement in Mathematics of 4th Grade Students in Pakistan (n = 3, 448)

Variable	Definition and metrics	Mean	SD
Math_score	Mathematics Learning Outcome	322.70	99.97
Female	Female = 1, Male = 0	0.46	
Home Life			
Par_involve	Parental Involvement in children's education		1.38
	1= *very low*	0.20	
	2 = *low*	0.22	
	3 = *medium*	0.26	
	4 = *high*	0.13	
	5 = *very high*	0.19	
Resources at Home	Resources at Home		.49
	1 = *few resources*	0.33	
	2 = *some resources*	0.67	
	3= *many resources*	0.23	
School Life			
Clarity_instruction	Clarity of Instruction for Teachers *Based on a scale from 1-12, with a higher score meaning more clarity of instruction.*	10.20	2.34
Belonging	Sense of Belonging *Based on a scale of 1-12, with a higher value connoting a sense of belonging.*	11.00	2.25

Source: TIMSS 2019

Limitations of the study

Due to the quantitative nature of this study there are numerous limitations, which warrants the descriptive presentation and analysis of our findings as well as a call for further research on this topic. First, our study was constrained by the limited number of variables included in Pakistan's 2019 TIMSS dataset. For example, in line with previous studies (Aslam & Kingdon, 2012; Alcott & Rose, 2015) we wanted to evaluate the effect of parental education on girls' learning outcomes. Yet the omission of parental education in the Pakistan survey prevented us from including it as an important predictor variable. Third, the scales used in TIMSS consist of students' self-reported information, meaning the results are limited to students' own reflections and statements, thereby compromising the overall validity of some predictor variables. Fourth, the variable "resources at home" was used as a proxy for students' socioeconomic status. As such, this variable is not a comprehensive or conclusive representation of socio-economic status. Lastly, due to the wealth quintile that grade four girls participating in the Pakistan TIMSS assessment likely belong to, we are careful not to overstate the extent to which our findings represent mathematics learning achievement for all grade four girls in Pakistan.

Analytical strategy

Using STATA, we conducted a statistical analysis with the publicly available TIMSS 2019 data set of grade four students in Pakistan. We conducted a multiple Ordinary Least Squares (OLS) regression analysis to understand the influence of gender on mathematical achievement. Our analysis includes four independent variables: parental involvement, home resources, clarity of instruction, and sense of belonging. We categorized the variables into home life (home resources and parental involvement) and school life (measured by the clarity of instruction and sense of belonging).

To generate an exact copy of the variable with valuable names, we used the *clonevar* command in STATA. By doing this, we generated new variables and labeled them, including math achievement scores, gender, parental involvement, resources at home, clarity of instruction, and sense of belonging. We then employed list-wise deletion to remove missing data for all variables except home resources. Next, we recoded gender as a binary nominal variable, and we recoded and relabeled parental involvement into five ordinal categories starting from 'very low' to 'very high.' Similarly, we recoded and relabeled home resources into three categories starting with 'few resources' to 'many resources. This process reduced the risk of deviation between variables' definitions and value labeling. Since there were 763 missing observations from the home resources variable, we decided to impute the missing observations. The average value of the home resources variable falls under the 'some resources' category. Hence, we imputed the missing data into that category.

After recoding the variables, we conducted the multiple OLS regression model to examine the effect of gender on mathematical score achievement while controlling for all other variables. With gender as our independent variable, we simultaneously included four predictor variables in the model: parental involvement, resources at home, sense of belonging, clarity of instruction, and sense of belonging. We also created a dummy variable for resources at home to understand whether there is a linear relationship between the categories of resources at home and grade four student performance in mathematics.

Finally, to understand the influence of gender on mathematics achievement scores among grade four students in Pakistan, we analyzed the interaction of our predictor variables to form a more sophisticated understanding of the influence of school life and home life factors on boys' and girls' respective performance in mathematics.

Results

As shown in Table 3, a multiple regression analysis was conducted to examine the effect of gender on mathematical achievement among grade 4 students in Pakistan. Using TIMSS data from 2019, we simultaneously entered five predictors into the model: female, parental involvement, resources at home, clarity of instruction, and sense of belonging. Model 1 presents a simple regression with gender as the predictor of mathematical achievement.   Here, we observe that girls perform 0.065 standard units higher than males in grade four mathematics, and the relationship is statistically significant ($p<0.05$, beta = 0.065).   We, therefore, accept the alternative hypothesis that student gender is associated with mathematics achievement. The effect of gender is slightly reduced, however, once we adjust for parental involvement, resources at home, clarity of instruction, and sense of belonging (model 5, beta = 0.052, $p<0.05$).

In model 2, we observe that with each additional unit of parental involvement, there is a decrease in mathematical achievement by 0.024 standard units; however, this association is not statistically significant (Model 2, beta = 0.025, $p>0.05$). In model 3, we see a 0.006 standard unit increase in mathematical achievement with every additional unit increase of resources at home. This association is also not statistically significant (Model 3, beta = 0.006, $p>0.05$). When computing dummy variables for resources at home, we found that there is no linear relationship. Students with 'some resources' score 40.02 points higher than students with 'few resources,' and the relationships are statistically significant ($p<0.05$). Similarly, students with 'many resources' score 40.48 points higher than students with 'some resources'. This relationship is also statistically significant ($p<0.05$). Model 4 shows that for each unit increase in clarity of instruction, there is a 0.184 standard unit increase in mathematical score achievement; this relationship is also statistically significant (Model 4, beta = 0.184, $p<0.01$). Lastly, in model 5, for every unit increase in students' sense of belonging, there is a 0.059 standard unit increase in mathematical score achievement. This relationship is also statistically significant (Model 5, beta = 0.059, $p<0.05$). In total, two out of the five predictor variables are statistically significant ($p<0.05$). Collectively, all five predictors explained four percent of the variance in mathematical achievement.

Table 3
OLS Regression for TIMSS 2019 Math Scores in Pakistan (n = 3,448)

Variable	Model 1	Model 2	Model 3	Model 4	Model 5
Female	0.065***	0.068***	0.068***	0.052**	0.052**
	(3.434)	(3.464)	(3.464)	(3.418)	(3.414)
Home Life					
Parental Involvement		-0.024	-0.025	-0.020	-0.016
		(1.251)	(1.258)	(1.237)	(1.239)
Resources at Home			0.006	0.005	0.006
			(3.625)	(3.564)	(3.560)
1. Resources at Home				0.000 (.)	-40.48** (0.257)
2. Resources at Home				0.46 (0.257)	-40.02** (0.262)
3. Resources at Home				40.48** (0.262)	0.000 (.)
School Life					
Clarity of Instruction				0.184***	0.158***
				(0.718)	(0.801)
Sense of Belonging					0.059**
					(0.837)
R^2	0.004	0.005	0.005	0.038	0.041
adj. R^2	0.004	0.004	0.004	0.037	0.040

Standardized beta coefficients; Standard errors in parentheses

* $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: TIMSS 2019

We next conducted an interaction effect analysis to understand the effect of home life (measured by parental involvement and resources at home) on females' performance in mathematics compared to males. We observe that for each additional unit in increase for

parental involvement, females perform 10.052 units lower than males (p<0.001). In this sense, compared to boys grade four girls' mathematics performance in Pakistan reduces when there is increased parental involvement. Yet for each additional unit increase of resources at home, females perform 11.333 units higher than males (p<0.05). Thus, despite the insignificant relationship of home resources with overall grade four student performance in Pakistan, it is worth noting that this variable contributes to higher levels of mathematics achievement for girls.

Table 4
Interaction Effect of Parental Involvement and Resources at Home with Gender on Mathematical Achievement (n=3,448)

Math Score	Coefficient	Std. Error	t	P>|t|
Parental Involvement	3.499	1.81	1.94	0.053
Female x Parental involvement	-10.052	2.49	5.34	0.00
Resources at Home	- 4.511	4.89	-0.92	0.356
Female x Resources at Home	11.333	7.23	1.57	0.117

Source: TIMSS 2019

Discussion and conclusion
Results from this study show that despite overall inequity in access to education for female students in Pakistan, girls are performing better than boys as measured through mathematics achievement. In particular, girls' 'sense of belonging' at school had a significant positive effect on 'math achievement'. Furthermore, 'clarity of teaching instruction' in schools showed the most positive and significant effect on math achievement compared to the other predictor variables considered in the study. On the other hand, 'parental involvement' in school activities was shown to have a significantly negative effect. 'Home resources' were also shown to have a statistically insignificant effect on 'math achievement' for grade four students in Pakistan. While girls outperform boys, overall mathematics achievement in Pakistan is considerably low compared to other TIMMS participating countries. Thus, considering the critical value of early-grade mathematics skills as a broad predictor for later mathematics achievement and academic success, this reality is a cause for concern (Aunio et al., 2021).

Identity
Despite inequitable rates of access to education, Pakistan's girls are still performing better than boys in early-grade math achievement (Farooq, 2020; TIMMS, 2019). This is a notable finding because an overwhelming array of sociocultural and economic factors discourage girls' full and equal participation in schooling in Pakistan (Azhar, 2008; Batool et al., 2003). Moreover, within a broader landscape of discriminatory gender norms, males with sufficient financial means have comparatively unimpeded access to school. However, as we have discovered, this does not correlate with better achievement

in mathematics overall (Rehman et al., 2013). Therefore, considering girls' limited opportunities and often inhospitable learning environments, there is a pressing need for more comprehensive research on the factors contributing to girls' higher-on-average rates of mathematics achievement compared to boys (Ali et al., 2012; Batool et al., 2013).

Due to discriminatory gender norms and the extent to which women are much less likely to be engaged in further education or employment than men, our research should prompt Pakistan to leverage girls' early-grade mathematics achievement, support and reinforce higher-level cognitive skills in later grades and continue to advocate for and fund lifelong access to learning for all (UNICEF & UNFPA, 2019). Positively, Pakistan's 'Vision 2025' puts forth a commitment to advancing education reform and pledges to increase public expenditure for education from 0.2% of Gross Domestic Product (GDP) to 1.4% of GDP (GoP, n.d.). As indicated in our findings, however, the GoP must adopt gender-responsive budgeting, prioritize home and school-life factors that best determine girls' engagement and achievement at school, and engage systems-level research that informs gender-responsive policy. Our concluding analysis below provides further guidance.

Home-life factors

The 'parental involvement' variable is shown to have a statistically insignificant effect on math achievement in Pakistan. Poor parental education levels and low literacy attainment are compounding factors (DHS, 2017). However, this finding is inconsistent with global studies whereby parents' involvement in children's education has been a statistically significant and positive factor in students' achievement at school (Shah et al., 2012; Suleman et al., 2012a). At the nexus of home environment and academic achievement, parents who take additional responsibility for their children's learning have traditionally corresponded with increased interest in academic achievement among children (Khan, 2019). As such, further research on why and how the variable of parental involvement in the TIMMS 2019 dataset has an insignificant effect on girls' achievement is required. Although our findings show a statistically insignificant influence, in line with the studies mentioned above we still advocate that children of illiterate or under-educated parents require improved access to remedial or accelerated education within formal and non-formal educational settings. Moreover, parents require access to adult education programs targeted toward home-support strategies for their children's learning (Shah et al., 2012; Suleman et al., 2012a; Khan, 2019).

Surprisingly, the 'resources at home' variable also showed a statistically insignificant effect on math achievement for grade four girls in Pakistan. Like 'parental involvement,' this finding is inconsistent with previous research whereby 'home environment' and 'home resources' are statistically significant factors in Pakistani students' academic achievement (Parveen, 2007; Muola, 2010). As much as we have employed the 'resources at home' variable as a proxy for students' socioeconomic status, the factors that constitute this variable may differ across studies. Typically, the socioeconomic status of a child is broadly determined by parental educational level, parental occupation, and income level, with previous studies finding that low socio-economic status or few resources at home have negatively influenced academic performance and have traditionally been a powerful predictor of students' academic under-performance (Jeyne, 2002; Suleman et al., 2012b).

School-life factors

Compared to our other predictor variables, 'clarity of instruction' positively and significantly influenced math achievement. 'Instructional clarity' represents the ability of teachers to organize the teaching and learning environment effectively and to carry out the teaching process in ways that cater to students' specific cultural, learning, and development needs (Yagan, 2021). As stated earlier, teachers are known to be the most important school-level factor influencing student achievement (Lovenheim & Turner, 2018). Therefore, our findings suggest that to continue strengthening mathematics achievement for girls in Pakistan, ongoing investment in the development of gender-responsive pedagogies through pre-service and in-service teacher professional learning programs is paramount.

The 'sense of belonging' variable also had a positive and significant effect on mathematics achievement for girls in Pakistan. This finding is corroborated by previous research where a positive correlation has been observed between a 'sense of belonging' and academic success among students in low-income countries (McMahon et al., 2008). This is an important finding for Pakistan, especially due to the aforementioned barriers to girls' access to and retention within Pakistan's school system. Pakistan spends far less on education than is recommended by UNESCO's guidance on girls' education; as such, the Government of Pakistan has not yet established an education system responsive to the unique needs of girls and young women (HRW, 2018). Moreover, due to an upward bottleneck in the education system - meaning fewer girls and young women progress to higher levels of schooling as they get older – our findings emphasize the importance of further investments in the school-level factors that promote retention, such as girls' 'sense of belonging' and teachers' 'clarity of instruction'.

In light of the evidence presented above, we strongly recommend that the GoP participates in the next round of TIMSS grade four *and* grade eight assessments. This will contribute towards the availability of longitudinal and comparable data on girls' mathematics achievement and inform policy iterations that improve equitable access to quality learning for all girls. Additionally, to reduce the need for proxy variables – like those we have depended on in this study – we recommend that Pakistan's Ministry of Education prioritizes the inclusion of question items contributing to variables such as 'parental education,' 'socioeconomic status,' and 'effective teaching instruction.'

Since Pakistan is party to several international treaties on inclusive and equitable education, the measures related to Sustainable Development Goals (SDGs) are yet to reach wide-scale policy implementation (Iqbal & Ashraf, 2023). In this view, to better align with the aspirations of SDG 4: Quality Education, substantive steps should be taken to introduce an all-inclusive education policy and impartial curriculum free from materials that promote gender-based discrimination (Arsha & Khanam, 2023). Furthermore, as Pakistan works towards ensuring the SDG 4 goal of inclusive and equitable quality education and lifelong opportunities for all, a more nuanced understanding of the impact that barriers to access and inadequate quality of education have on girls' long-term educational engagement and achievement is needed. Finally, not forgetting Pakistan's 22.8 million out-of-school children and youth (55% of whom

are girls), non-formal education providers also need to take stock of the home-life and school-life factors that enable out-of-school girls' engagement and retention; by fore fronting these factors, we hope that effective pathways are put in place to enable an accelerated transition from non-formal to formal schooling and future employment for all.

Sumit Karn *is a doctoral student in the Comparative and International Education program at Teachers College, Columbia University. He endeavors to comprehensively investigate educational inequities and ascertain the extent of public opinion's sway on policymaking in low- and middle-income countries. In addition, his scholarly pursuits encompass gender education, research-practice partnerships, the deficit of trust in public educational institutions, and the privatization of education.*

Vandita Churiwal *is a graduate student at Teachers College, Columbia University. She previously worked in the education sectors of India, Lebanon, and for the UNESCO Asia-Pacific Regional Office in Bangkok, Thailand. With her Integrative Project focused on the empowerment of Syrian refugees in Lebanon, her work is targeted toward equitable educational outcomes for vulnerable children in low- and middle-income countries.*

Chris Henderson *is a doctoral fellow at Teachers College, Columbia University. He also works as a senior consultant in South and Southeast Asia and the Middle East for humanitarian and development agencies, including UNICEF, UNHCR, and the World Bank among others. His work and research focuses on girls' education and education in emergencies and his dissertation is focused on Rohingya teacher motivation and the refugee crisis in Bangladesh.*

Mia Chin *is passionate about advancing basic education and systems strengthening reforms within the humanitarian-development nexus. Prior to commencing the doctoral program at Teachers College, Mia completed her MPA at Columbia University's School of International and Public Affairs (SIPA). She brings over ten years of education, humanitarian, and development experience in Asia and the Middle East with academic institutions, civil society, UNDP, INGOs, and USAID. Currently, Mia is an Education Technical Specialist advising USAID's largest education portfolio globally to improve Jordanian and refugee children's access to quality education.*

Shreya Sanjeev *is a doctoral student at Teachers College, Columbia University. Previously a marine biologist with WWF-India, and conservation educator with UNDEF, her doctoral dissertation is focused on student perceptions and experiences in higher education and how this can inform sustainability practices in formal curriculum and pedagogy, business models, and operations of higher education in India.*

References

Ali, S. (2012). Education policy borrowing in Pakistan: Public-private partnerships. *Education in the broader Middle East: Borrowing a baroque arsenal*, 23-40.

Alcott, B., & Rose, P. (2015). Schools and learning in rural India and Pakistan: Who goes where, and how much are they learning? *Prospects*, 45, 345-363.

Aslam, M., & Kingdon, G. G. (2012). Parental education and child health—understanding the pathways of impact in Pakistan. *World Development*, 40(10), 2014-2032

Azhar, T. (2008). *Patriarchy, Militarization, and the Gender Gap in Education: The Case of Pakistan.* Pennsylvania State University Press.

Alreshidi, A. M., Alsharif, K. M., & Kandeel, R. A. A. (2021). Five Important Parental Involvement Variables that Affect Young Children's Mathematical Achievements: A Comparative Study. *Education and Urban Society.* https://doi.org/10.1177/00131245211048440

Arshad, T., & Khanam, A. (2023). A Proposed Curriculum Model of Ethical and Moral Education for Secondary Schools in Pakistan. *Journal of Academic Research for Humanities*, 3(1), 1-12.

Aunio et al. (2021). "An Early Numeracy Intervention for First-Graders at Risk for Mathematical Learning Difficulties." *Early Childhood Research Quarterly*, *55*, 252-262. https://doi.org/10.1016/j.ecresq.2020.12.002

Batool, S. Q., Sajid, M., & Shaheen, I. (2013). Gender and higher education in Pakistan. *International Journal of Gender and Women's Studies*, *1*(1), 15-28.

Coleman, J. S. (1968). Equality of educational opportunity. Integrated education, 6(5), 19-28.

Farooq, A. (2020). Gendered perceptions in Punjab, Pakistan: Structural inequity, oppression and emergence. *Journal of Gender Studies*, *29*(4), 386-402.

Fishbein, B., Foy, P., & Yin, L. (2021). TIMSS 2019 user guide for the international database. https://timss2019.org/international-database/downloads/T19_UG_Supp1-international-context-questionnaires.pdf

Education Policy Data Center: Making sense of data to improve education (DHS). (2006). *Out of School Children of the Population Ages 7-14.* https://www.epdc.org/sites/default/files/documents/Pakistan_OOSC_Profile.pdf

Ghasemi, E., & Burley, H. (2019, December 20). *Gender, affect, and math: A cross-national meta-analysis of trends in International Mathematics and Science Study 2015 outcomes - large-scale assessments in education*. SpringerOpen.

Retrieved April 3, 2023, from https://largescaleassessmentsineducation.springeropen.com/articles/10.1186/s40536-019-0078-1

Global Education Evidence Advisory Panel. (2020). *Cost Effective Approaches to Improve Global Learning*. World Bank.

Government of Pakistan. (n.d.) Pakistan Vision 2025. https://www.pc.gov.pk/uploads/vision2025/Pakistan-Vision-2025.pdf

Human Rights Watch. (2018). *"Shall I Feed My Daughter, or Educate Her?" Barriers to Girls' Education in Pakistan*. https://www.hrw.org/report/2018/11/12/shall-i-feed-my-daughter-or-educate-her/barriers-girls-education-pakistan#

Iqbal, K., & Ashraf, S. (2023). Perspective Chapter: The Barriers in Inclusive Set-Up for Students with Visual Impairment at Higher Education Level-Pakistan Scenario. In *Higher Education-Reflections From the Field*. IntechOpen.

Khan, M. J. (2019). School quality and parental schooling decisions for their children: Public and private schools in rural Pakistan. *The Pakistan Development Review*, *58*(2), 177-202.

Kim, S. W. (2018). "Parental Involvement in Developing Countries: A Meta-Synthesis of Qualitative Research." *International Journal of Educational Development*, vol. 60, pp. 149–56. https://doi.org/10.1016/j.ijedudev.2017.07.006.

Martin, M. O., & Mullis, I. V. (2019). TIMSS 2015: Illustrating advancements in large-scale international assessments. *Journal of Educational and Behavioral Statistics*, 44(6), 752-781. https://doi.org/10.3102/1076998619882030

McMahon, S. D., Parnes, A. L., Keys, C. B., & Viola, J. J. (2008). School belonging among low income urban youth with disabilities: Testing a theoretical model. *Psychology in the Schools*, *45*(5), 387-401.

Mercader et al. (2018). "Contributions of Motivation, Early Numeracy Skills, and Executive Functioning to Mathematical Performance. A Longitudinal Study." https://www.frontiersin.org/articles/10.3389/fpsyg.2017.02375/full

Muller, C. (2018). Parent involvement and academic achievement: An analysis of family resources available to the child. In *Parents, their children, and schools* (pp. 77-114). Routledge.

Mullis, I. V. S., & Martin, M. O. (Eds.). (2017). *TIMSS 2019 Assessment Frameworks*. Retrieved from Boston College, TIMSS & PIRLS International Study Center website: http://timssandpirls.bc.edu/timss2019/frameworks/

Mullis, I. V. S., Martin, M. O., Foy, P., Kelly, D., & Fishbein, B. (2020). *TIMSS 2019: International results in mathematics and science*. TIMSS & PIRLS International Study Center, Boston College. http://timssandpirls.bc.edu/timss2019/international-results/

Muola, J. (2010). A Study of the Relationship Between Academic Achievement Motivation and Home Environment Among standard eight pupils. *Journals of Educational Research and Reviews*. 5(5); 213-217.

National Institute of Population Studies - NIPS/Pakistan and ICF. (2019). *Pakistan Demographic and Health Survey 2017-18. Islamabad, Pakistan: NIPS/Pakistan and ICF*. Available at http://dhsprogram.com/pubs/pdf/FR354/FR354.pdf.

Parveen, A. (2007). *Effects of Home Environment on Personality and Academic Achievements of Students of Grade 12 in Rawalpindi Division*. Research thesis, National University of Modern Languages, Islamabad, 32-41.

Rehman, K., Rehman, Z., Saif, N., Khan, A. S., Nawaz, A., & Rehman, S. (2013). Impacts of job satisfaction on organizational commitment: a theoretical model for academicians in HEI of developing countries like Pakistan. *International Journal of Academic Research in Accounting, Finance Management Sciences, 3*(1), 80-89.

Sitabkhan, Y., and Platas, L. M. (2018). *Early Mathematics Counts: Promising Instructional Strategies from Low- and Middle-Income Countries*. RTI Press Publication No. OP-0055-1807. Research Triangle Park, NC: RTI Press. https://doi.org/10.3768/rtipress.2018.op.0055.1807

Suleman, Q., Aslam, H. D, Shakir, M., Akhtar, S., Hussain, I., & Akhtar, Z. (2012). Effects of Family Structure on the Academic Performance of Students at Elementary Level in District Karak, Khyber Pakhtunkhwa (Pakistan). *Journal of Sociological Research*, Vol. 3, No.2

Suleman, Q., Aslam, H. D., Hussain, I., Shakir, M., Khan, F. U., & Nisa, Z. (2012). Effects of parental socioeconomic status on the academic achievement of secondary school students in Karak district, Pakistan. *International Journal of Human Resource Studies, 2*(4), 14-32.

Sultana, N. (2012). *Right to Education for Girls in Pakistan: Malala's Struggle Must Continue*. Open Society Foundation. https://www.opensocietyfoundations.org/voices/und-49

The Guardian (2020) *Dominic Raab is challenged to admit 40% cuts to foreign aid for girls' education*. Retrieved May 5th 2020: https://www.theguardian.com/global-development/2021/apr/27/dominic-raab-is-challenged-to-admit-40-cuts-to-foreign-aid-for-girls-education

UNESCO Global Education Monitoring Report (2022) *Gender Report: Deepening the Debate on those Left Behind. UNESCO. Paris.*

UNICEF & UNFPA (2019) *Gender Counts South Asia: A Quantitative Measurement of Gender Inequality and its Impact on Children and Adolescents.* UNICEF ROSA: Kathmandu

UNICEF (2022). *Education*. Retrieved May 2, 2022, from https://www.unicef.org/pakistan/education

UNDP. (2020). *Human Development Report: The Next Frontier: Human Development and the Anthropocene.* https://hdr.undp.org/sites/default/files/Country-Profiles/PAK.pdf

World Bank. (2021). *'Trained teachers in primary education'.* https://data.worldbank.org/indicator/SE.PRM.TCAQ.FE.ZS?locations=PK

World Bank. (2019). *'Improving Learning Outcomes and Investing in Girls & Women Crucial to Pakistan's Sustained Growth'.* https://www.worldbank.org/en/news/press-release/2019/12/11/improving-learning-outcomes-and-investing-in-girls-women-crucial-to-pakistans-sustained-growth

Yagan, S. A. (2021). *The relationships between instructional clarity, classroom management and mathematics achievement: Mediator role of attitudes towards mathematics.* University of South Florida M3 Center Publishing, *3*(2021), 7.

Teachers' Perspectives of Parents in Rural African Communities

Bukola Oyinloye
University of York

Teachers' perspectives of their pupils' parents are a critical element of the relationship between schools, families, and communities. However, in various rural African communities, teachers' views of parents' perspectives and practices around schooling are primarily ones of deficit rather than strength. This paper deepens this literature by offering insight into teachers' perspectives in two rural communities in Nigeria. Using an ethnographic approach and applying concepts from the capability approach, this paper explores teachers' perceptions of parents' values in relation to their children's schooling (parental functionings) and their views of the extent to which parents are able to pursue these functionings. The findings resonate with the existing deficit perspectives in the literature. In addition, the findings expand the literature by revealing an empathetic dimension to these deficit perspectives, suggesting that current evidence around teachers' uniformly deficit perspectives of parents offers only a partial view. Illuminating the empathy that underpins teachers' perspectives offers the possibility of finding common ground between schools and families which may widen opportunities for forging or deepening positive parent-teacher relationships which support children's social, emotional, and academic development.

Keywords: rural Africa, home-school partnerships, parental agency

Introduction

The relationship between homes and schools is believed to be one of the most important factors for children's academic, social, and emotional development (Epstein et al., 2002). Underpinning this relationship are the perspectives that school teachers have of families (e.g., parents) and the perspectives that parents hold of schools, with the former contributing to the ways in which schools seek to engage with parents. Within the vast global literature on parental involvement in schooling, the majority from industrialized contexts, there is evidence of contentious bidirectional views (Oyinloye, 2021a). However, the literature highlights the prevalence of normative, dominant, white, middle-class assumptions about schooling which the perspectives and practices of certain non-dominant groups such as minorities, immigrants, and parents from low socio-economic backgrounds are measured against (Oyinloye, 2021a). These

assumptions persist even in light of the evidence of school-level barriers faced by such groups (Kim, 2009). In Africa, the limited literature available suggests that similar assumptions persist (e.g., Hartell et al., 2016; Tusiime et al., 2016). In relation to non-dominant groups such as rural Africans or those from lower socio-economic backgrounds, these assumptions manifest in teachers' deficit views about what parents think of formal schooling, and how they engage with it.

This paper contributes to this growing literature by further exploring the perspectives that teachers hold of parents in the rural communities in which they teach. Specifically, it examines: (1) what teachers perceive as parents' value on behalf of their children; and (2) why they hold such values, (3) the extent to which teachers believe parents are able to act on these values, and (4) the various influences that shape teachers' perspectives on parents. This paper is structured as follows. The first section begins with a synthesis of key literature from anglophone Africa which sheds light on how teachers perceive parents, and an introduction of the 'capabilitarian' concepts upon which this paper draws. The second section presents the broader context of the study. The third part explains the study's methods, including ethics and analysis. The fourth section presents the findings while the fifth and final section discusses the findings and their implications.

Literature Review

Various studies, particularly from rural or lower-income urban communities in sub-Saharan Africa with the majority from South Africa, suggest that teachers' views of parents' perspectives and practices around the schooling of their children in Africa are primarily one of parental deficit (e.g., Hartell et al., 2016; Makgopa & Mokhele, 2013; Mbokodi & Singh, 2011; Mukwambo, 2019).

In South Africa, parents' articulation of constraints around their participation in School Governing Bodies (SGBs) – a legal requirement of South African schools composed of parents, school heads, educators, non-teaching staff, and students – were represented as complaints. On school involvement, including through SGBs, teachers, school heads, and learners were critical of parents in rural and lower-income communities who did not understand their roles, responsibilities, and expectations (Hartell et al., 2016; Makgopa & Mokhele, 2013; Mncube, 2007); were non-literate or minimally formally educated (Hartell et al., 2016; Mbokodi & Singh, 2011; Mncube, 2007; Singh et al., 2004); lived (Lemmer & van Wyk, 2004) or worked (Triegaardt & van Diermen, 2021) far from school; or lacked time (Bojuwoye, 2009; Lemmer & van Wyk, 2004; Triegaardt & van Diermen, 2021), school linguistic competence (Michael et al., 2012; Mncube, 2007; Singh et al., 2004), and participation skills (Lemmer & van Wyk, 2004; Mbokodi & Singh, 2011). Many of these factors are perceived by teachers as underpinned by social issues such as parents' low socio-economic status (e.g., Singh et al., 2004;

Triegaardt & van Diermen, 2021) and family structure and dynamics (Triegaardt & van Diermen, 2021).

Studies from outside South Africa demonstrate similar deficit views. In Zimbabwe, teachers reported that parents' lack of interest in schooling limited teachers' own educational efforts for children (Mukwambo, 2019). In Kenya and Ghana, some teachers believed non-literate, rural parents were 'ignorant' of the value of schooling (see Serpell's (1993) on ignorant conservatism), with some suggesting that children's uncleanliness reflected parents' lack of enforcement of hygiene at home (Buckler, 2012). In another study from Kenya, teachers did not consider parents sufficiently competent to contribute to classroom learning activities (e.g., telling stories, teaching a skill, etc.) or to the organization of extra-curricular sports and cultural events (Kimu & Steyn, 2013). In a rural Rwandan study of home literacy environments, a father's perception of his role in schooling, i.e., to buy children books, was interpreted by the researcher as a lack of concern for learning (Tusiime et al., 2016). While in rural Tanzania, parents' preference for 'family education' due to their frustrations around children's repeated failures in school, despite significant time spent in school and on exam preparations, was uncritically interpreted as a lack of valuing of education (Haule, 2021, p. 10).

Deficit depictions of parents in relation to their perspectives and practices around schooling have also been linked to those about broader parenting (e.g., Tusiime et al., 2016). For instance, Kenyan teachers reported that children who had behavioral and academic challenges had parents who were poor and generally uninvolved (Kimu & Steyn, 2013). In contrast, a South African study of parents in a peri-urban community concluded that "many parents did not seem to understand their role as parents" [even as it acknowledged that] eighty percent of parents [...]constantly spoke about their different domestic problems" (Singh et al., 2004, p. 303). Alluding to the influence of culture, Ghanaian school administrators admonished parents whom they thought preferred to spend money on parties, weddings, and funerals while neglecting food, school fees, and supplies (Donkor, 2010). In northern Nigeria, teachers, local officials, and other community members of school management committees felt parents – particularly those with children out-of-school or with fledgling attendance in rural areas and who had little or no literacy or numeracy abilities themselves – had no value for schooling and were, thus, ignorant and unenlightened (Cameron et al., 2018; Dunne et al., 2013; Little & Lewis, 2012; Pinnock, 2012). In a seminal study from rural Zambia, officials believed parents who involved children in economic activities, e.g., fishing and farming, rather than schooling sabotaged their children's future (Serpell, 1993). Although deficit views in the literature are usually perpetuated by non-parents, they are sometimes perpetuated by researchers, as the studies from South Africa, Rwanda, and Tanzania demonstrate (Haule, 2021; Singh et al., 2004; Tusiime et al., 2016).

Despite some acknowledgment of the influence of prevailing socio-economic, social, and cultural factors, the existing literature suggests that teachers believe parents should be able to overlook or overcome these factors by remaining uncritically positive in their evaluation of schooling. Moreover, it suggests that teachers believe parents should persist against all odds to become involved in the way that schools prescribe. Thus, little is known about what teachers perceive parents actually value and why, and what parents are perceived to be able to do. Moreover, there is a limited understanding of what influences these perceptions. This paper, therefore, contributes to the literature by offering some new insights into teachers' perceptions of what parents value in relation to the schooling of their children and how teachers make sense of these values and actions.

Conceptual framework
This paper draws on key concepts within the capability approach. The approach was developed by economist philosopher Amartya Sen in the late 1980s to broaden human capital views of human development. For him, these ideas focused too narrowly on increasing gross domestic product (GDP), personal wealth, industrialization, or technological advancement. Rather, Sen argued development should "expand the real freedoms that people enjoy" (Sen, 1999, p. 3) where such freedom facilitates (as a means) and is the outcome (the end) of development processes. Among the core concepts are capability, functioning, and agency. Capability is the freedom to pursue or achieve what one values being or doing, where those valued beings and doings, or functionings, constitute one's wellbeing (Alkire, 2005; Sen, 1985). Capabilities refer to the combinations of *functionings* that constitute a person's current state of being and doing. Valued *functionings* are typically distinguished from realized ones, where the former is what people can be or do and the latter is what people are being or doing (or what they have managed to achieve). Embedded within the concept of capability are two concepts: freedoms (the opportunities or options one values); and agency (the ability to pursue or achieve the opportunities one chooses) (Alkire, 2005). Some choices include trade-offs, where some options are pursued because one's current circumstances prevents the pursuit of the options one truly values (Khader, 2013). Agents, may pursue valued goals that contribute primarily to others' wellbeing even if the goals also contribute to theirs. A parent may, for example, choose and pursue parental goals, which are goals on behalf of their child[ren], to achieve the functioning of the child being educated, a functioning which primarily contributes to the child's wellbeing in terms of the child's future educational outcomes and secondarily to parents' wellbeing through the pride associated with being the parent of an 'educated child'. Agents have agency freedom (the ability to choose which goal(s) to pursue) and agency achievement, the extent to which they succeed in the pursuit of their chosen goals (Sen, 2009).

Parental agency is thus conceived here as a parents' actions to bring about parental goals and the concept may be further specified depending on the domain in which the goals lie, e.g., schooling. Accordingly, parental capabilities are parents' freedom to pursue or achieve valued beings and doings on behalf of their children (i.e., parental *functionings*). Parental capabilities and functionings, therefore, contribute directly to child wellbeing, and less directly to parent wellbeing. Moreover, parental functionings are distinguished from parents' functionings, i.e., what a parent themself values being or doing to primarily constitute their own wellbeing. In this paper, the concept of parental functionings is employed to conceptualize what teachers believe parents value being or doing to constitute their children's wellbeing in relation to schooling. Moreover, the concepts of parental capabilities and parental agency are used to highlight the freedom and agency parents have to pursue their parental functionings.

Study Context
This paper draws from a broader qualitative ethnographic study exploring the perspectives and practices of parents on schooling. The study was carried out in two rural, Muslim Yorùbá communities in the North central geographical zone of Nigeria and the community-level information seen in this section has been provided by or observed in communities. The community level data cited in this section has been drawn from the fieldwork.

The Nigerian pre-tertiary formal schooling system comprises of universal basic education (one year of early childhood, six years of primary, and three years of junior secondary education) and three years of senior secondary schooling, a 1-6-3-3 structure. Universal basic education (UBE) is free by Federal policy, but states charge a variety of fees including entrance, term, and end of term fees along with significant secondary terminal examination costs. Unsurprisingly, UBE implementation is fraught with challenges such as gross underestimation of enrolment, shortages of certified teachers, and significant underfunding (Bolaji et al. 2016). The broader study from which this paper is drawn lies within this prevailing schooling context and sought to explore the perspectives and practices of parents on the formal basic schooling of their children, as well as the views of teachers. This paper draws from the findings around this latter aim.

The two communities (henceforth comm A and comm B) and schools of the broader study were selected with the help of two gatekeepers (referred to as key contacts), one a former colleague. The communities were selected because they were small (less than 1,000 inhabitants) and contained a public primary school (school A and school B), rendering them information rich and well-positioned to help fulfill the broader research aims. Both communities are geographically but also ethnically, religiously, and, for comm A, familiarly affiliated (Bray, 2003); however, although comm A is located within one boundary, comm B is a constellation of villages grouped together as comm B. Comm B is also more rural

than comm A, with the latter somewhat peri-urban. In Comm A, men's occupation is primarily in transportation (local and commercial taxi and large vehicle drivers) though more recent economic challenges have led some older fathers to supplement their livelihoods with farming. The women are primarily engaged in small-scale off-farm micro-enterprises or the farming and sale of vegetables, locust beans, yams, plantains, soya beans, cashew nuts, and cassava grains. In Comm B, men are predominantly farmers though a few combined this with other work. Comm B operates a market day every five days to sell commodities to buyers from near and from afar. Both children and women participate in the market day. Additionally, Comm B women engage in farming and, like comm A, sell condiments and ingredients like cooked food, snacks, and food provisions.

The comm A primary school (school A) was established during the expansion of primary schooling in the mid-1970s when universal primary education (UPE) was introduced to Southwest Nigeria. The school is located within a large compound which also consists of a junior and senior secondary school (J/SSS), established in 2003, whose principal was of the other key contact who introduced the author to both schools. This other key contact also participated in the interviews. At the time of the study, school A was experiencing a number of challenges. The fieldwork for the study occurred over two phases: an extended five-month phase in late 2018-2019, and a month-long follow-up in late 2019, some eight months thereafter. During the main fieldwork period from 2018-2019, the school's population appeared to be diminishing. No official enrolment data was obtainable for the academic year. Although enrolment was verbally estimated to be above 100, attendance during the two weeks of observation in the early part of 2019 averaged about 60 per day. Moreover, the school A headteacher retired at the end of 2018 and his replacement – who arrived in January 2019 – departed early in the summer of 2019. By the time of the follow-up, the situation appeared to have changed. A new headteacher had begun, the population was growing – one day, I counted 96 learners – and there were more teachers in the school, including trainee/student teachers, most of whom were from comm A.

Comm B has one public primary school (school B) and one public J/SSS across the road. Like school A, school B was founded during the introduction of UPE while the J/SSS was founded more recently in 2013. Both the primary and J/SSS serve the various villages of comm B. While school B's enrolment for the 2018-2019 academic year was reportedly nearly 200 (according to the headteacher), average attendance for a few weeks in early 2019 revealed just over half of enrolled students actually attended. The lowest attendance observed, 78, occurred on a Friday, the Muslim weekly day of prayer. According to school B's headteacher, children's market day absenteeism had markedly improved as she had firmly told parents that the school would not accept it.

It was difficult to know the teacher population of each school due to the fluctuating patterns of teacher attendance, particularly during the main fieldwork period. From the field notes, apart from the headteacher transitions at school A, the school had all teachers except for Primary one. School B had no teachers for primary one, two, and five. Except for one teacher in each school, all other teachers were Muslim, most were women, all were Yorùbá, and apart from a few local teachers in school B who were married to comm B men, most lived outside of the community in a big town from which they commuted. Both schools were located at different ends of the big town though school B was a longer commute from the big town and, due to the paucity of transportation available sometimes, a more challenging one. Without seeking to reduce the above ethnographic detail, the following table summarizes some of the main features of each of the two communities:

Table 1
Key characteristics of studied communities

	Comm A	Comm B
Population (estimated)	<1000	<1000
religion	Islam; handful of Christians	Islam; some traditional religion
Geography	single 'bounded' community; peri-urban	set of villages; rural
Men's primary occupation	transportation	farming
women's primary occupation	off-farm micro-enterprises	off-farm micro-enterprises
schools	primary; junior secondary and senior secondary (combined)	primary; junior secondary and senior secondary (combined)
Primary school enrolment 2018/2019 (estimate)	>100	>200
primary school attendance 2018/2019 (average from obs)	~60	~109

Source: self-elaborated.

Methodology
Qualitative researchers study social phenomena in their natural settings and seek to "make sense of or interpret" (Denzin & Lincoln, 2017, p. 10). Such phenomena according to the meanings' participants ascribe to them. Philosophically, this is consistent with a constructivist paradigm that views reality as diverse, multiple mental constructions based on the experiences and social interactions in specific local settings (Lincoln et al., 2017). Underpinned by this philosophical position, the study adopted a qualitative approach to explore and understand the meanings teachers make of their knowledge of the schooling perspectives and practices of their pupils' parents (Creswell, 2014). This study used

semi-structured interviews as the primary qualitative method. Interviews are defined by Rubin & Rubin (2012) as (gently) guided discussions with a *conversational partner*, one respected and trusted as a reliable source of information on the topic of interest. Interviews range on a continuum from no structure to completely structured where the greater the structure, the more predetermined the interview questions (Qu & Dumay, 2011). However, even the most structured interviews may allow for flexibility, or the modification of subsequent questions in the direction of the conversation (see Rubin & Rubin's (2012) *responsive interviewing).*

The study also drew from ethnography – a deliberate, systematic way to learn about participants' social and cultural lives (LeCompte & Schensul, 2010) – and employed ethnographic interviews as well as participant observations (Atkinson & Hammersley, 2007). Ethnographic interviews are qualitative interviews embedded within an ethnographic approach. As such, as Munz (2017) suggests, ethnographic interviews often occur as part of participant observations, within participants' naturalistic settings, in spontaneous ways, and between researchers and participants who typically already have some form of relationship. Ethnographic interviews may also occur with groups spontaneously, may be planned in advance (with an existing group), or may be more focused (i.e., with a group whose members may or may not be familiar with each other) (O'Reilly, 2012). In this study, ethnographic interviews and informal or situational conversations (Munz, 2017) occurred with teachers and school administrators in transit as well as within the school settings in each community. In this paper, I use the term 'interaction' (see De Fina & Perrino's (2011) *interactional encounter*) to refer to the qualitative and ethnographic interview processes between teachers and me, which fall within the 'structure' continuum, the spatial continuum (e.g., from the open, dynamic and often transitory public spaces on the roads to the more private, usually static, confidential offices of the headteachers (Neale, 2017)).

Participant observation is the process of learning about people's worlds by exposure to or involvement in their routine activities within the research setting (Schensul & LeCompte, 2013). It includes being present and interacting with participants during an activity or event (Schensul & LeCompte, 2013) and standing back, taking notice, and making notes (O'Reilly, 2012). With teachers, I observed and participated while we sat under the gathering tree in their school compounds; while waiting for the staff or other transport at designated locations in the main town; while hitchhiking or hopping on and off cars; during school assemblies; and while substituting, when requested, for an absent teacher. The criticality of notetaking combined with the often-transitory nature of such participant observations resulted in notetaking in transit on my mobile phone (this way of notetaking had been pre-empted and had thus been ethically approved).

Given the ethnographic approach, these diverse forms of interactions, participations, and observations occurred with participants multiple times over the two phases of fieldwork, with subsequent interactions building on previous ones. Though the slightly more structured interactions were never scheduled in advance given the exigencies of the school day, they were confirmed with teachers on the day they would occur, and typically held during the morning or lunch break. One pivotal yet spontaneous group interaction occurred during the main fieldwork, and I observed that the group setting encouraged teachers to speak freely and feed off each other. Therefore, all interactions with teachers during the follow-up fieldwork occurred in groups. Although all teachers spoke and understood English to varying degrees, our interactions were conducted entirely in the local language to increase understanding, enrich the breadth of responses, and deepen overall trust. Given teachers were operating in an official space, I obtained their informed consent on signed forms, providing each with a photocopy of their signed form.

In all, 23 different teachers (9 male, 14 female) participated in the individual and group interactions from both schools during the extended (17 teachers) and follow-up (10 teachers, 4 from extended) periods of fieldwork. The other key contact (the school A J/SSS principal) was amongst those interviewed given he previously led school B and could offer a comparative view of both schools and communities. As previously noted, the other key contact introduced the author to both schools, and the heads of these schools authorized the author to approach their teachers for interviews. All but one teacher approached agreed to be interviewed due to fears of being recorded. Ethical approval for the study was obtained from the author's institution. The table below specifies the number of teachers and staff across all interactions (school A's custodian has also been included).

At each phase, more female than male teachers were interviewed, a reflection of the school's teacher demographic. Except for the custodian, all teachers held the required Nigeria Certificate in Education (NCE) qualification. The longest serving teacher across both schools, the school B primary, two teachers had been serving at the school for 17 years and lived in a town some minutes from the school. During fieldwork, four school A teachers lived locally, either within comm A or in a nearby town a few minutes away. At school B, two teachers lived in a nearby town, including the headteacher. The rest of the teachers lived in the main town. Except for one female teacher in each of school A and school B, all teachers were Muslim, and the majority lived in polygynous households.

Table 2
Number of teachers in individual / group interactions

	School A						School B		
	Teachers		Other staff*		Other teachers**		Teachers		Total
	M	F	M	F	M	F	M	F	
Fieldwork	3	4	1	-	4	1	1	4	18
Follow-up	-	5	-	-	-	-	1	4	10
Total	3	9	1	0	4	1	2	8	28

*custodian; **second key contact and colleagues (2M, 1F), plus another J

As part of its decolonizing methodological approach, the study obtained ethical approval from the author's institution in the United Kingdom as well as the Nigerian Federal Ministry of Health, and embedded participants' epistemologies within the overall ethics framework (Oyinloye, 2021b). Transcription was conducted after each period of fieldwork. A thematic analytical approach was used to identify themes that "represent some level of patterned response or meaning within the data set" (Braun & Clarke, 2006, p. 82). A theme, moreover, consists of one or more group(s) of codes: terms or phrases which capture the essence of parts of the data (Braun & Clarke 2013). The next section presents the findings according to the three purposes of this paper: teachers' views on parents' values in relation to their children's schooling; teachers' perceptions of parents' ability to pursue these values, particularly schooling; and the influences that shape teachers' perceptions. The findings are primarily from data generated during the main fieldwork phase.

Findings
Parental and parents' functionings
Teachers across both schools elicited varied but nuanced perspectives around what they believed the parents in their school-communities value. Though the fervency with which functionings were evoked differed, some similar themes were identified in both schools. Teachers in both schools were vociferous about parents they believed were uninterested in their children's schooling. 11 of the 17 teachers in both schools emphasized this view during fieldwork. However, teachers often balanced their views about parents' lack of interest in schooling with views about what they thought parents were, instead, interested in and valued.

Farming, handiwork and celebrations
At school B, the greatest among other values was farming and every school B teacher mentioned this during our interaction. Regarding the extent to which she tries to engage with parents at school B, the primary 3 teacher surmised:

…one will do it more than that of the town. Being that because those rural people now, you know that they have, they have, their own work is that of the farm. Ehnn? Ehnnn! And the majority of parents are these, they want that, they prefer that their children be at the farm, to be doing farm work more than they should be coming to school.

At school A, parents' valuing (and prioritizing) farming was mentioned within the context of the cashew rush – the intense period of cashew harvest in February and March when families went to farms to pick cashews to dry and sell its nuts up the value chain. The following was part of an exchange during a morning assembly at the height of the cashew season at school A:

Assistant Head: [to the children] Be washing your clothes, it's not good like this! You're too dirty! Look at how you are?!

Teacher 1: The parents of some, they don't have time.

Assistant Head: Ah ha! You're now saying their mother has gone to the cashew nut farm, their father has gone to the cashew nut farm, will they not find someone at home there? Please, the children will now, will now be looking like thing, and you'll be bringing them! When they wake up, they'll carry the sticks used for cashew nut farming!

Teacher 2: They can't do anything for the children, what is happening?!

Parents' highly valuing cashew nut farming was reiterated by school A teachers during casual conversations under the school gathering tree. This occurred particularly when mothers walked through the school compound with long sticks (used to tip cashews off their branches), either coming or going from the cashew nut farm, sometimes with a school-aged child in tow. Although observations revealed that comm B simultaneously experienced a cashew rush, perhaps because of the high-intensity farming experienced throughout the year, school B teachers did not single it out as a parental functioning in the way that school A teachers did.

While less frequently mentioned than farming, teachers also believed parents' interest in schooling was subverted by their interest in informal apprenticeships, or what was commonly called handiwork. Three school B teachers mentioned this, including the headteacher. At school A, handiwork was mentioned by only two of eight individual teacher interactions during fieldwork but with a salience that betrayed the frequency of its mention. Emphasizing the extent of the practice in comm A, the primary 5 teacher noted, "that thing is very common in this environment!"

Alongside farming and handiwork, school B teachers perceived that parents valued expending resources on cultural and communal events or celebrations. While no school A teacher mentioned such celebrations explicitly during our individual interactions, during a morning assembly, teachers severely reproached and punished nearly the entire primary six class who had skipped school the previous Friday to attend a celebration, bemoaning parents' leniency and general lacklustre attitudes toward schooling as the reason for children's temerity for such an act.

Polygyny, early marriages and mothers' struggles
In addition to farming, handiwork, and attending/spending on celebrations, teachers across both schools mentioned two additional functionings of parents deemed uninterested in schooling: polygyny (for themselves) and early marriages (for children). Early marriage was evoked by multiple school B teachers as a general disposition in comm B for boys and girls as early as upper primary school. At school A, it was evoked by the primary 2 teacher as a practice for girls and as a result of poverty where highly economically disadvantaged mothers, particularly those in polygynous households, thought it better for their teenage girl child to be married to someone who could better materially provide. Interlinked with this view was the perception that fathers were uninterested in schooling yet prided their ability to assemble wives (and, as a result, children) for whom they provided little. This view was espoused multiple times – by four of eight teachers – and with a fervency akin to that with which school B teachers asserted parents' valuing and prioritizing farming over education. Given polygyny is a norm within the Muslim Yorùbá communities (as both a cultural and legal religious practice), teachers presented the assemblage of wives as problematic not because of their disapproval of it, but because they felt some men abused the practice and married more wives than they could provide for, which rendered husbands unable and usually uninterested in bearing the responsibilities of the household. As such, these teachers felt mothers disproportionately bore the weight of the responsibility for their children within the household, and their struggles were exacerbated by their meagre livelihoods.

The school A primary 2 teacher was vocal about the constraints' mothers faced. For her, although comm A mothers were generally interested in schooling, their life contexts severely constrained their capability to pursue the schooling that they valued for their children:

> You know all those times that, the person who had one wife, who had two wives, who had one child, who had two children, the power was carrying it [i.e., they could provide for their family]. Now, that the children are many, that the wives are many… the woman just faces the responsibilities of her children…the woman with the responsibilities of her children is it!

> And how many jobs can we women do that we can take care of children?!
> The power is not carrying it, it's that the power is not carrying it…

As the quote alludes, teachers perceived comm A mothers to be particularly disadvantaged given the greater degree of polygyny in their community. Attempts to quantify the number of wives comm A men resulted in estimates ranging from two to five to many. Such was the perceived extent of a father's abdication of their household responsibilities that one female teacher from school A J/SSS remarked, "there are no husbands….there are only children!" During the same interaction a male teacher from the same secondary school retorted, "Women are the men in this community, men are the women!" Similar sentiments about mothers' struggles occurred at school B, with the primary 6 teacher noting:

> On the farm [i.e., in the rural areas] sometimes, it's the women who struggle that their children become 'educated'. It's the women who… the women… [are] trying. Those women, they want their children to go to school but there is usually no power [i.e., means] there. There is no power."

During the follow-up fieldwork, some eight months after the initial fieldwork, the school B headteacher noted that on the farm "what men value is that they gather together four or five wives. There's nothing concerning them about [schooling]. It's for them to be feeling proud that I also have five of your type [i.e., women or wives] at home.". However, unlike school A, fewer school B teachers mentioned the extent of polygyny suggesting that the extent of polygyny in comm B is less than that of comm A. This possibility is supported by the demographic data of parent participants in the broader study which found 23 wives in 10 comm A households (an average of 2.3) and 14 wives in eight comm B households (an average of 1.75). In addition to polygyny, As a functioning for fathers in the communities, polygyny is amongst the sources of fathers' reported lack of interest in schooling. Two male teachers (one at school A and another at school A J/SSS) attributed comm A fathers' apparent lack of interest in children's schooling relative to mothers to the fathers' livelihoods as transporters resulting in their physical absence from home for significant periods of time.

Despite teachers' general characterization of fathers as lacking interest in schooling, during fieldwork, the school B headteacher noted some exceptions in comm B saying, "the rural people are [generally] not interested in schooling, [but] there are a few who are good among them [who] want to learn." No such exceptions were mentioned by school A teachers, although the principal of the comm A J/SSS distinguished between the "serious" and collectively minded comm B fathers and the more individualistic comm A fathers. In his view, the deeper poverty experienced in comm B is evidenced by the continual erection of

new homes in comm A, and he highlighted the irony of the serious but poor comm B fathers and the unserious but less poor comm A fathers. The highlighting of such exceptions across both communities demonstrates that teachers also believe schooling is a significant parental functioning for some parents although achieving this functioning is subject to the influence of the wider social and cultural environment, socio-economic status, and gender. Across both schools, analysis of teachers' perspectives identified other parental functionings like sending children to elementary Islamic schooling to learn how to recite the Quran before or after school and sending children to hawk goods to support the household economy.

Figure 1 illustrates the various parental (PF) and parents' functionings (F) across both communities. The middle of the Venn diagram highlights the values perceived by teachers to be held across both comm A and comm B, while the right and left sections of the diagram highlight those only mentioned by teachers in either school.

Figure 1
Teachers' views on parental and parents' functionings
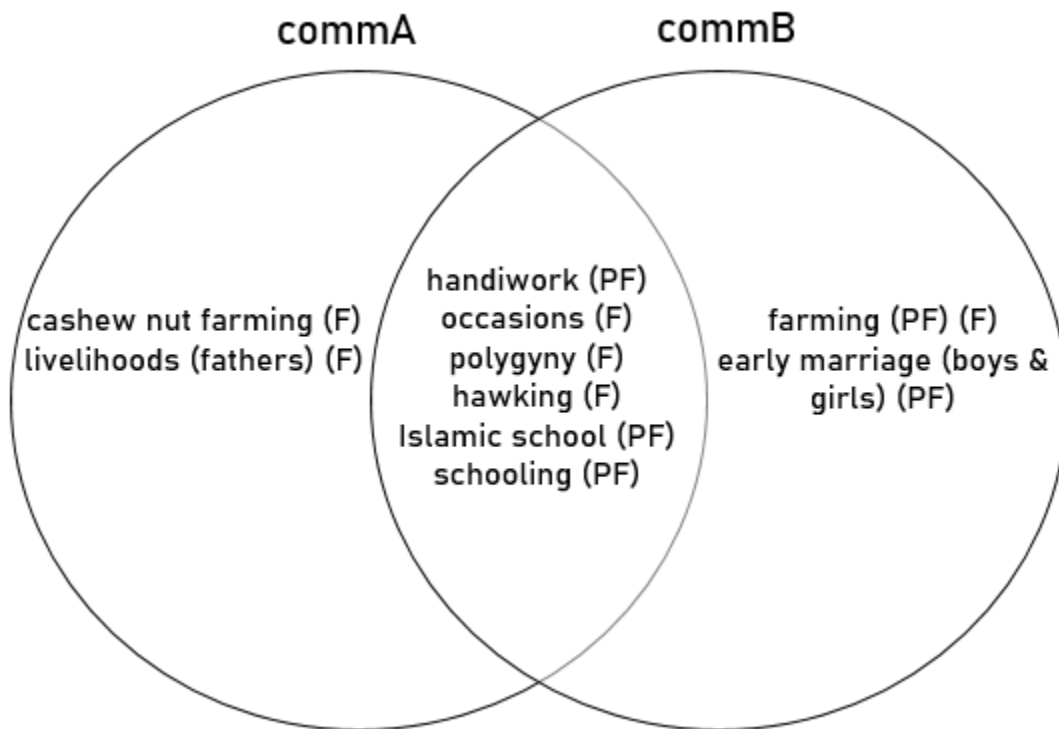
Source: self-elaborated.

Parental agency

Evident within these perceptions is a sense of the extent to which teachers perceive parents are able to exercise agency in the pursuit of their functionings. Parents were perceived to be better able to choose to pursue and meaningfully achieve their diverse non-schooling functionings. In contrast, parental agency was perceived to be limited around schooling, particularly in relation to teachers' specific schooling expectations such as school-based activities (e.g., participation in school governance bodies, attendance at parent-teacher association meetings, provision of children's fees and school supplies) and home activities (e.g., involvement in homework and reviewing children's books). For homework, although teachers recognized that the majority of their parent population had never attended school, they believed parents could still exercise parental agency by asking older children to help check children's homework or by setting aside time and instructing the children to review work after school. For such learning-specific activities, though parents had not gone to school themselves, teachers believed parents could still exercise parental agency indirectly by not only providing a conducive learning environment, but also by soliciting intermediaries who had the capabilities to directly exercise the required action.

The findings suggest that teachers believe parental functionings overall (both schooling and non-schooling) are determined by the intersection of parents' dispositions as rural people who live on the farm, while their parental agency (particularly in relation to schooling) is determined by the resources available to them within a broader context of broader economic, social and political structures.

Moreover, further interactions with teachers highlighted their perceptions that economic constraints compelled parents who do value schooling to adapt their parental functionings based on a realistic assessment of what parents believed their children are likely to achieve. For teachers, this was the primary reason that drove parents' enrolment of children in handiwork across both communities, and while some parents were believed to pursue this for their children instead of further schooling after the completion of primary school, others were believed to pursue it in addition to schooling with the hope that either pathway may eventually lead to success for their child. Teachers, thus, perceived three reasons for parents' perspectives and practices: constrained parental agency (the partial pursuit and, thus, achievement of chosen, valued [schooling] options); forced trade-offs (the pursuit of other, often lesser valued [non-schooling] options due to parents' socio-economic circumstances); and a lack of interest or faith in schooling (complete disbelief in the promises of schooling).

Discussion and conclusion

This paper has examined teachers' varied perspectives on what parents value and do in relation to formal schooling in two rural Nigerian communities. It revealed that teachers in the two schools largely believe parents do not value schooling because of their dispositions towards other functionings such as farming, handiwork, occasions, and early marriage among other values. The plethora of perceived non-schooling values reported in these communities echo the deficit tropes in the literature of rural people's limited knowledge or understanding of schooling discussed at the beginning of this paper.

The findings also revealed that teachers acknowledged some parents do value schooling but were constrained in their ability to choose and pursue relevant practices to achieve it on behalf of their children. This view uncovered teachers' gendered perspectives in two ways. First, fathers across both communities (though to a greater extent, in comm A) were perceived to highly value polygyny which constrains mothers' capabilities to secure children's schooling by heightening mothers' poverty due to the reduction in the share of household resources. Second, female teachers who themselves were in polygynous households particularly excoriated polygynous fathers whom they believed abdicated their household responsibilities, thereby leaving their wives to solely cater for their children's educational and other needs. Except the single female Christian teacher in each school, all other female teachers in schools A and B were Muslim and lived in polygynous households. As such, their lived experiences underpinned their strongly held perceptions of the connection between polygyny and mothers' constrained agency. This second gendered dimension of teachers' perspectives moreover highlights the empathetic aspect of teachers' perspectives and challenges the existing dominant deficit views in the literature.

As seen earlier in the literature, other studies have connected teachers' views of parents' constrained choices with parents' difficult life contexts such as poverty and household dynamics (e.g., Kimu & Steyn, 2013; Singh et al., 2004; Triegaardt & van Diermen, 2021). However, only a few scholars have demonstrated teachers' identification of these linkages (e.g., Buckler, 2012; Donkor, 2010; Kimu & Steyn, 2013) or connected parents' constraints with polygyny (Donkor, 2010). Where such intersections are identified, as with Donkor (2010), there is little attempt to further interrogate them or link teachers' perceptions with teachers' own lives. Such nuances are absent in the extant literature which appears to largely assume that teachers, particularly rural ones, have little in common with parents in rural school-communities, even if they live near or around such communities. An exception is Buckler (2012) who suggests that teachers' own rural backgrounds facilitate empathy with rural lives and that teachers who hold close personal relationships with school-communities have functionings that align with those school-communities. However, the findings of this paper suggest that this empathy is deepened when teachers' personal life experiences

resonate with those of parents in their school-communities (and where teachers are aware of these) whether or not teachers have similar rural backgrounds or close personal relationships with the communities. In this way, even where teachers may perpetuate deficit views of parents, these views are simultaneously underpinned by empathy which arises from teachers' ability to metaphorically walk a mile in parents' shoes. Such empathy, or the capacity to find some common ground, is critical for the forging or deepening of positive parent-teacher relationships which support children's social, emotional, and academic development.

The paper's ethnographic data, analysed using the capability approach, demonstrates the varied and nuanced perceptions teachers in rural African schools hold of the parents of their pupils. These perceptions are, in turn, strongly influenced by teachers' perceptions of rurality, personal life experiences, accumulated knowledge of school-communities, and the prevailing macroeconomic condition whose effects are felt not only by parents but also by teachers. Parents' elucidation of constraints relative to schooling in the literature and in this paper suggest a greater need to interrogate how normative schooling expectations interact with rural parents' lives in context, and how these everyday lives influence parents' perspectives as well as actions around schooling.

Bukola Oyinloye *is a Research Associate at the University of York. Her research spans equity and diversity in HE; family-school partnerships; education and adolescence in Africa; global education systems and governance; global childhoods and youth; informal apprenticeships; ethics; indigenous epistemologies; and school leadership and management.*

References

Alkire, S. (2005). Capability and functionings: Definition & justification (Briefing Note). *Human Development and Capability Association* [HCDA].

Atkinson, P., & Hammersley, M. (2007). *Ethnography: Principles in practice* (3rd ed.). Routledge.

Bojuwoye, O. (2009). Home-school partnership – a study of opinions of selected parents and teachers in Kwazulu Natal Province, South Africa. *Research Papers in Education*, 24(4), 461-475.

Bolaji, S. D., Campbell-Evans, G., & Gray, J. (2016). Universal basic education policy implementation in Nigeria. *KJEP*, 13(2), pp. 137-158.

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), pp. 77-101.

Braun, V., & Clarke, V. (2013). *Successful qualitative research: a practical guide for beginners*. SAGE Publications, Inc.

Bray, M. (2003). Community initiatives in education: Goals, dimensions and linkages with governments. *Compare: A Journal of Comparative and International Education*, 33(1), pp. 31-45.

Buckler, A. (2012). *Understanding the professional lives of female teachers in rural sub-Saharan African schools: A capability perspective* (39228) [Doctoral dissertation]. http://oro.open.ac.uk/39228/

Cameron, S., Gelander, G. P., Jagmag, M., Jasper, P., Doyle, A., Laufer, H., Harb, J., Hebbar, M., & Barbone, L. (2018). Teacher Development Programme endline evaluation (Volume I). Education Data, Research & Evaluation in Nigeria [EDOREN].

Creswell, J. W. (2014). *Research design: Qualitative, quantitative and mixed methods approaches (4th ed.).* SAGE Publications, Inc.

De Fina, A., & Perrino, S. (2011). Introduction: Interviews vs. 'natural' contexts: A false dilemma. *Language in Society*, *40*(1), 1-11.

Denzin, N. K., & Lincoln, Y. S. (2017). Introduction: The discipline and practice of qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *The SAGE handbook of qualitative research* (5th ed.) (pp. 1-26). SAGE Publications, Inc.

Donkor, A. K. (2010). Parental involvement in education in Ghana: The case of a private elementary school. *International Journal about Parents in Education*, *4*(1), 23-38.

Dunne, M., Humphreys, S., Dauda, M., Kaibo J., & Garuba, A. (2013). *Adamawa State primary education research: Access, quality and outcomes, with specific reference to gender. Adamawa State Primary Education Board.* Sussex Research Online: Sussex Research Online. http://sro.sussex.ac.uk/id/eprint/46059/1/Adamawa_Primary_Education_Research-final_report.pdf

Hartell, C., Dippenaar, H., Moen, M., & Dladla, T. (2016). Principals' perceptions and experiences of the role parents play in school governing bodies in rural areas. *Africa Education Review, 13*(1), 120-134.

Haule, K. (2021). Role-perception as a factor for parental involvement in primary school children's schooling: Comparative analysis from Moshi municipality and Meatu district in Tanzania. *Papers in Education and Development, 39*(1), 1-14.

Khader, S. J. (2013). Identifying adaptive preferences in practice: Lessons from postcolonial feminisms. *Journal of Global Ethics, 9*(3), 311-327.

Kim, Y. (2009). Minority parental involvement and school barriers: Moving the focus away from deficiencies of parents. *Educational Research Review, 4*(2009), 80-102.

Kimu, A. M., & Steyn, G. M. (2013). Applying the Epstein model to investigate parent involvement in public primary schools in Kenya. *Journal of Asian and African Studies, 48*(5), 607-622.

LeCompte, M. D. & Schensul, J. J. (2010). *Designing and conducting ethnographic research: An introduction* (2nd ed.). Altamira Press.

Lemmer, E. M., & van Wyk, N. (2004). Schools reaching out: Comprehensive parent involvement in South African primary schools. *Africa Education Review, 1*(2), 259-278.

Lincoln, Y. S., Lynham, S. A., & Guba, E. G. (2017). Paradigmatic controversies, contradictions, and emerging confluences, revisited. In N. K. Denzin & Y. S. Lincoln (Eds.), *The SAGE handbook of qualitative research* (5th ed.) (pp. 108-150). SAGE Publications, Inc.

Little, D., & Lewis, I. (2012). *Impact of support to SBMCs: stakeholders' views of change* (Report No. 423). ESSPIN.

Makgopa, M., & Mokhele, M. (2013). Teachers' perceptions on parental involvement: A case study of two South African schools. *Journal of Educational and Social Research, 3*(3), 219-225.

Mbokodi, S.M., & Singh, P. (2011). Parental partnerships in the governance of schools in the Black townships of Port Elizabeth. *Perspectives in Education, 29*(4), 38-48.

Michael, S., Wolhuter, C. C., & Wyk, N. v. (2012). The management of parental involvement in multicultural schools in South Africa: A case study. CEPS Journal, 2(1), 57-82.

Mncube, V. S. (2007). Social justice, policy and parents' understanding of their voice in School Governing Bodies in South Africa. *Journal of Educational Administration and History, 39*(2), 129-143.

Mukwambo, P. (2019). Human development and perceptions of secondary education in rural Africa: A Zimbabwean case study. *Compare: A Journal of Comparative and International Education, 51*(6), 806-823.

Munz, E. A. (2017). Ethnographic interviews. In M. Allen (Ed.), *The SAGE encyclopedia of communication research methods* (pp.455-457). SAGE Publications, Inc. https://dx.doi.org/10.4135/9781483381411.n168

Neale, B. (2017). *Generating Data in Qualitative Longitudinal Research: A methodological review*. Timescapes Archive. https://timescapes-archive.leeds.ac.uk/wp-content/uploads/sites/47/20 20/07/Generating-Data-in-QL-research-Timescapes-Working-Paper-8.pdf

O'Reilly, K. (2012). *Ethnographic methods* (2nd ed.). Routledge.

Oyinloye, B. (2021). *Parents' perspectives and practices around the schooling of children in rural Northern Nigeria* (Doctoral dissertation). https://oro.open.ac.uk/80376/

Oyinloye, B. (2021). Towards an Ọmọlúàbí code of research ethics: Applying a situated, participant-centred virtue ethics framework to fieldwork with disadvantaged populations in diverse cultural settings. *Research Ethics, 17*(4), 401–422. https://doi.org/10.1177/17470161211010863

Pinnock, H. (2012). *Performance analysis of SBMC data 2010–2011* (Report No. 424). ESSPIN.

Qu, S., & Dumay, J. (2011). The qualitative research interview. *Qualitative Research in Accounting & Management, 8*(3), 238-264.

Rubin, H. J., & Rubin, I. S. (2012). *Qualitative interviewing: The art of hearing data* (3rd ed.). SAGE Publications, Inc.

Schensul, J. J. & LeCompte, M. (2013). *Essential ethnographic methods: A mixed methods approach* (2nd ed.). AltaMira Press.

Sen, A. (1985). Well-Being, agency and freedom: The Dewey Lectures 1984. *The Journal of Philosophy, 82*(4), 169-221.

Sen, A. (1999). *Development as freedom*. Oxford University Press.

Sen, A. (2009). *The idea of justice*. Penguin Books.

Serpell, R. (1993). *The Significance of Schooling*. Cambridge University Press.

Singh, P., Mbokodi, S. M., & Msila, M. T. (2004). Black parental involvement in education. *South African Journal of Education*, *24*(4), 301–307.

Triegaardt, P. K., & Diermen, E. v. (2021). School management strategies to improve parental involvement: Insights from school principals in Southern Tshwane primary schools. *Journal of Social Science Research*, *17*, 78-90. https://doi.org/10.24297/jssr.v17i.8796

Tusiime, M., Friedlander, E., & Malik, S. (2016). The literacy ecology of four Rwandan Children. In E. Friedlander & C. Goldenberg (Eds.), *Literacy boost in Rwanda: Impact evaluation of a 2-year randomized control trial* (pp. 122-164). Stanford University.

Postcolonial Critiques on Globalization and Privatization of Education in Pakistan

Gul Muhammad Rind
Department of Education, Sukkur IBA University, Pakistan

Introduction and Background of the Study

Globalization of education is widely contested in the current academic discussion due to its polarizing effects on the economy, society, and culture. Spring (2008) defined globalization as "worldwide networks, processes, and institutions affecting local educational practices and policies" (p. 1). The international trade and free market policies have on the one hand, strengthened the role and importance of Multinational Corporations (MNCs) and International Organizations (IOs); on the other, these enterprises have weakened state power and marginalized the Indigenous culture in the formerly colonized regions of the Global South (Rizvi, 2007)**.** Further, globalization is glorified for knowledge production and dissemination, and it is generally viewed narrowly and depicts its non-political impact on education and society. According to Spring (2008), globalization of education includes a global curriculum, discourse of knowledge economy and technology, multiculturalism, standardized methods of instruction and testing, gender equality, and English as a global language. Globalization and colonization have several commonalities because the origin of globalization can be traced to the colonial era. Colonialism has resulted in the hegemony of transnational agreements and global corporations. Through the heavy investment of capital into local communities, these institutions have diluted states' power and mandate in many economic, cultural, and educational activities (Enslin, 2017).

The privatization of education has also emerged with globalization. It operates through a neoliberal framework of competition, public choice, and market efficiency (Verger et al., 2016). Neoliberalism is a politico-economic model "which proposes that human well-being can best be advanced by the Privatization of entrepreneurial freedoms within an institutional framework characterized by private property rights, individual liberty, free markets, and free trade" (Harvey, 2005, p. 145). The Education for All agenda (later revised as 2030 Sustainable Development Goals) is a global initiative that also pressures countries to usher in private investment in education, as well as multilateral and bilateral aid (Draxler, 2020). Alarmingly, globalization deploys aid of soft or hard conditions and standardized practices (e.g., privatization of education) to impose the cultural objectives of the Global North onto the Global South (Johnson, 2006; Verger et al., 2016). In general, globalization and privatization of education in the Global South have created power asymmetry in policymaking, western hegemony, marginalization, and subjugation of local culture (Rizvi & Lingard, 2009; Steiner-Khamsi, 2016).

Applying a post-colonial critique and analysis, this paper will discuss how globalization is a colonial legacy that transforms Western educational policies in developing countries like Pakistan and how it creates Westernization, supremacy, and marginalization of teachers and students (Spring, 2008).

Post-colonial Critique of Globalization in Education

Postcolonialism and its meanings are not limited to the time period after colonialism and imperialism, but rather a dialectical concept of historical decolonization, sovereignty-building, and confronting the existing economic, political, and cultural imperialism (Young, 2016). The emergence of post-colonial theories can be traced through the period of the 1970s in cultural studies and in the writings of literature (Andreotti, 2011). By the same token, the perspective of postcolonial studies developed in other fields such as politics, history, and education. Education becomes the key theme to challenging colonialism and its legacy of marginalization by developing indigenous resistance and decolonial thoughts (Enslin, 2017). Post-colonial theories are mainly related to anti-imperialist arguments contributed by non-western scholars such as Frantz Fanon, Edward Said, Homi Bhabha, and Gayatri Spivak (Gandhi, 1998). It also challenges the western epistemic power and paradigm in education disseminated through World Bank, Organization for Economic Co-operation and Development (OECD), and other contemporary IOs (Rizvi & Lingard, 2009: Spring 2009). Young (2016) sums up the scope of postcolonial critiques to all kinds of oppressions inherited from colonization.

In this era of globalization, the colonial legacy operates its power and hegemony in formerly colonized countries through IOs such as the World Bank, International Monetary Fund (IMF), OECD, and other development agencies (Spring, 2009). Said (2003) informed that every single empire justified imperialism with a special situation. The justification of today's imperialist IOs is the mandatory enlightenment and civilization of local people. Besides, IOs contend that the use of force is the last resort. Along with the development funds and loans, these IOs also perpetrate their neoliberal and capitalist policies and practices that promote privatized and standardized education.

Globalization and colonialism have several similarities by sharing the same conceptual ground (Rizvi, 2007). During (2000) stated that "From this post-colonialist perspective, colonialism in effect becomes an episode in the longer sweep of globalization, and all events that once fell under the rubric of colonialism are ripe to fall under the rubric of globalization" (p. 392). It is criticized by post-colonial theorists and scholars that Western academic enterprises are not based on true knowledge and evidence, but rather on a rational approach to Western supremacy (Andreotti, 2011). Specifically, in the field of education, post-colonial theory offers an analysis of power structure within the education system, ethnocentric and Eurocentric hegemony, and cultural supremacy discourse in curriculum and instruction. Further, this theory helps explore how the Western approach creates more fragmentation and hierarchy in the education system.

Privatization of Education

The privatization project of IOs (such as the World Bank) is hailed in post-colonial states through loans and aid. Through neoliberal policies, governments rely on market forces to obtain educational services, which creates an elite system and marginalization among disadvantaged communities (Apple, 2006). In the context of low-income countries and the postcolonial world such as Pakistan, the World Bank, IMF, and other organizations

shape the colonial legacy of education through their various policy tools. As it has been analyzed by critical scholars (Johnson, 2006; Spring, 2009; Steiner-Khamsi & Waldow, 2012) that in this neoliberal and globalized world, educational policies are developed in the western countries and transferred to the recipient countries through demands and coercion in low-income countries without their consent.

Other scholars (Shahjahan, 2012; Spring, 2009) believe IOs initiative in the education of client countries is a form of neocolonial domination that reproduces Western epistemic knowledge and neoliberal ideology. Looba (2015) explained that globalization apparently reduces economic and social boundaries. The free flow of capital due to globalization integrates recipient nations into the world system and the development discourse. Globalization creates disintegration, suppressing local industries and extracting money from third-world countries through debt services.

In this setup, educational policies emanate from IOs that transfer Global North policies to the Global South. Examples of this phenomenon are the spread of policies fostering the private management of public schools, and vouchers or subsidy schemes, advocated by the World Bank (Klees et al., 2012; Moschetti & Verger, 2019; Steiner-Khamsi & Waldow, 2012). Due to the unequal power relations in the global world, these neoliberal education policies are mostly based on efficiencies and measurable outcomes that override equity and social justice (Rizvi & Lingard, 2009). To some extent, the modernization and globalization of mass education that entails Western cultural values have improved the material standard of living; however, what is constantly ignored is the impact on developing nations' social cohesion and mobility (Samoff, 2003).

Socio-political and Educational Context of Pakistan

Pakistan was formerly the colonized region of united India under Great Britain's empire. It gained independence in 1947 after the atrocious partition of India. The colonial legacy and Western dominance persisted because of the fragile economy which led to its heavy reliance on external (predominantly Western) aid and debts from IMF, World Bank, and other financial institutions (Durrani & Halai, 2020). Soon after Pakistan's founding, a national education conference took place in 1947. Along with government schools, there were additional policies for other schools based on the European or covenant models (Bengali, 1999; Rahman, 2004). These schools catered to elites, like children of bureaucrats, armed forces, and politicians. English as the medium of instruction generated a perception of better education quality. However, the rest of the government schools taught in local languages like Urdu, Sindhi, and the like (Rahman, 2004). This was the pure replication of the colonization model because the graduates of the government school system ended up getting low-cadre and clerical jobs.

It has also been acknowledged in the National Education Policy (Government of Pakistan, 2009) that such parallel education systems violate the uniformity of the national education system (Fancy & Razaq, 2017). Further, it has been reported this uneven education system buttresses the marginalization and inequity in human development; ultimately it hampers inclusive and sustainable development of the country (Government of Pakistan, 2009).

Globalization and Privatization of Education in Pakistan

Globalization in education policies are rapidly changing the current educational landscape in several countries including Pakistan. According to Rizvi and Lingard (2009), previously public school policies were developed exclusively at the nation-state level, where the role of government was prioritized. In the current era, these policies are manipulated by the international system operated by World Bank, OECD, and other development agencies. It has redirected education from social democrats to the neoliberal market system. The role and purpose of education have also diminished within the discourse of human capital development and knowledge economy to meet international labor market needs (Lauder et al., 2012; Rizvi & Lingard, 2009; Spring, 2009). This approach in education continues the colonial legacy in countries like Pakistan, where approaches to social justice and equity fizzle out.

The emergence of globalization in tandem with the expansion of privatization has impacted every level of the education system including K-12 and higher education in Pakistan (Rind & Knight Abowitz, 2022). The Western epistemology and knowledge production dominate Pakistan's education system. Generally, people falsely associate the European model or English-teaching schools are superior in quality (Datoo, 2014). Yet, the majority of the country's population does not fit the Western culture and values because Islam is the religion of more than 90% of the population. The emerging educational policies (e.g., National Education Policy 2009) show that Pakistan responds to the pressure of globalization and embraces dominant discourse such as knowledge economy and human capital development to attract international aid which has increased after the 9/11 incident (Lingard & Ali, 2009).

When the donor gets interested in education policy reform, curriculum reform is one of the critical aspects. As Lingard and Ali (2009) pointed out, Pakistan shifted its curriculum more toward enlightenment in the Musharraf regime after getting more funding from the USA and the United Kingdom through United Nations Agency for International Development (USAID) and UK Department for International Development (DfID). However, Pakistan's social structure and culture are essentially rooted in Islamic values. The role of DfID also resulted in defunding Pakistani teachers for the sake of low-fee or low-cost private schools. Similarly, USAID has also invested in education through public-private partnerships. In this setup, the private sector is considered efficient in school management (Rind, 2022).

The low-fee private schools mushroomed in Pakistan over the past few decades; the World Bank and DfID widely supported these schools and connected governments with private actors through public-private partnerships in education (Rind, 2022). Currently, more than 40% of Pakistan's educational institutes is offered through private mode with loose regulations (Pakistan Education Statistics, Government of Pakistan, 2018). Steiner-Khamsi (2004) cautioned that the privatization, decentralization, and standardization of education always have global dimensions and influences. Social scientists (e.g., Ball, 2007; Lauder et al., 2012; Rizvi & Lingard, 2009; Spring, 2009) worry that a large scale of deregulation weakens the nation-state and creates structural inequality. For instance, the World Bank Third Punjab Education Sector Project in Pakistan aimed to promote sustainable development and poverty reduction by improving access to schools for the poorest. The goal was achieved through providing

vouchers to parents, expanding PPPs through increasing low-cost private schools, and providing incentives through stipends for secondary schools attendance   This mechanism ultimately promotes privatization policies in the country. Rind's (2022) study noted that some degree of efficiency and improved governance exists in low-fee private schools and PPP schools in Sindh based on subsidies and private management of public schools. However, this schooling model fails to reduce inequality or ensure quality education. Ironically, these schools resulted in more inequality among schools. They also marginalized and de-professionalized teachers through low-paid contractual jobs.

Besides school education, globalization has also influenced the higher education system. The government of Pakistan also allowed private universities through charter to work during the 1980s (Halai, 2013). This practice has widened the education divide between the elite and the common people. Currently, these universities are reinforcing social stratification and dominating the job market. The elite universities are all private institutions charging huge tuition fees. According to the Higher Education Commission Pakistan Statistics 2017-18 (HEC, 2020), 76 out of 187 universities are private urban schools that target high-income families. Elite graduates have the opportunity to obtain lucrative jobs, while graduates from ordinary public schools end up in low-paid clerical jobs or remain unemployed (Mukhtar, 2012; Rahman, 2004). Pakistan's current IMF package also reduces the government's education budget and other social services in lieu of adopting pro-privatization policies.

Cultural Identity Crisis
Currently, Pakistan is facing a serious identity dilemma. Islam remains the religion for most Pakistani people. They adhere to the cultural values of family and social justice. Therefore, Pakistanis' reality is incompatible with IOs' advocacy for imported modernity facilitated by the so-called enlightening curriculum and the best practices. In fact, modernization further marginalizes the Pakistani people and deprives them of their local languages and culture (Lingard & Ali, 2009; Rahman, 2004). Due to inconsistent curricula and widening socioeconomic inequality, these IOs-mandated pro-privatization policies will jeopardize Pakistani democracy and further polarize the country (Rind & Knight Abowitz, 2022).

Conclusion
In the name of the best practices, IOs' dissemination of policies from the Global North to the Global South renders underdeveloped countries vulnerable to losing their cultural values and epistemic knowledge. The advancement of global forces enhanced standardization and privatization in the education system of Pakistan which has increased educational inequity along with the loss of indigenous language and culture. The Pakistani government has recommended policy action through public-private partnerships in education to reduce the government's burden. Simultaneously World Bank and DFID have promoted low-fees (through low-cost) private schools in Pakistan. This narrow commodification of education encourages the private sector to invest in education and thrive at the cost of social cohesion and equity (Rind & Knight Abowitz, 2022).

The post-colonial and indigenous scholarship in education will offer better frameworks of equitable access to quality education for all. There is also a need for regulations of schools in Pakistan so that they are no longer aggravating the plight for the oppressed population based on their cultural identity, language, religion, gender, and other socioeconomic factors.

Gul Muhammad Rind *is a PhD. from Miami University in Fall 2022 in Educational Leadership, Culture, and Curriculum. Dr. Rind is currently working as a lecturer in the Department of Education, at Sukkur IBA University, Pakistan. His research interests are comparative education, education policy, and leadership for equity and social justice.*

References

Andreotti, V. (2011). *Actionable postcolonial theory in education*. Palgrave Macmillan.

Apple, M. W. (2006). Understanding and Interrupting Neoliberalism and Neoconservatism in Education. *Pedagogies: An International Journal*, *1*(1), 21–26. https://doi.org/10.1207/s15544818ped0101_4

Ball, S. J. (2007). *Education plc: Understanding private sector participation in public sector education*. Routledge.

Bengali, K. (1999). *History of Educational Policy Making and Planning in Pakistan*. Sustainable Development Policy Institute.

Draxler, A. (2020). Education for All Open for Business? Public Goods vs. Private Profits. In A. Wulff (Ed.), *Grading goal four: Tensions, threats, and opportunities in the sustainable development goal on quality education*. Brill Sense.

Durrani, N., & Halai, A. (2020). Gender Equality, Education, and Development: Tensions between Global, National, and Local Policy Discourses in Postcolonial Contexts. In A. Wulff (Ed.), *Grading goal four: Tensions, threats, and opportunities in the sustainable development goal on quality education* (pp. 65–95). Brill Sense.

During, S. (2000). Postcolonialism and Globalization: Toward a Historicization of their Inter-relation. *Cultural Studies*, *14*(3/4), 385–404. https:// doi.org/ 10.1080/09502380050130392.

Enslin, P. (2017). *Postcolonialism and Education*. Oxford University Press. https://doi.org/10.1093/acrefore/9780190264093.013.4

Fancy, H., & Razaq, J. (2017). Accountability in Education in Pakistan (No. 20; Global Education Monitoring Report). UNESCO. https://unesdoc.unesco.org/ark:/48223/pf0000259549

Gandhi, L. (2020). *Postcolonial theory: A critical introduction*. Routledge.

Government of Pakistan. (2009). *Nation Education Policy 2009*. Islamabad.

Gewirtz, S., Ball, S. J., & Bowe, R. (1995). *Markets, choice and equity in education*. Open Univ. Press.

Halai, N. (2013). Quality of private universities in Pakistan. *International Journal of Educational Management*, 27(7), 775–786. doi:10.1108/ijem-11-2012-0130.

Harvey, D. (2005). *A brief history of neoliberalism*. Oxford University Press.

Higher Education Commission, Pakistan. (2020). Higher education commission Statistics 2017-18. https://www.hec.gov.pk/english/universities/Pages/AJK/UniversitiesStatistics.

Johnson, D. (2006). Comparing the trajectories of educational change and policy transfer in developing countries. *Oxford Review of Education*, *32*(5), 679–696. https://doi.org/10.1080/03054980600976411

Klees, S. J., Samoff, J., & Stromquist, N. P. (Eds.). (2012). *World Bank and Education: Critiques and alternatives*. Sense Publishers.

Lauder, H., Young, M., Daniels, H., Balarin, M., & Lowe, J. (Eds.). (2012). *Educating for the knowledge economy? Critical perspectives*. Routledge.

Lingard, B., & Ali, S. (2009). Contextualising Education in Pakistan, a White Paper: Global/national articulations in education policy. *Globalisation, Societies and Education*, 7(3), 237–256. https://doi.org/10.1080/14767720903166053

Moschetti, M., & Verger, A. (2019). Opting for Private Education: Public Subsidy Programs and School Choice in Disadvantaged Contexts. *Educational Policy*, 089590481988115. https://doi.org/10.1177/0895904819881151

Mukhtar, A. (2012). The Neoliberalization of Education Services (Not Including Higher Education) Impacts on Workers' Socioeconomic Security, Access to Services, Democratic Accountability, and Equity—A Case Study of Pakistan. In D. Hill (Ed.), *The developing world and state education: Neoliberal depredation and egalitarian alternatives*.

Rahman, T. (2004). *Denizens of Alien Worlds: A study of education, inequality and polarization in Pakistan*. Oxford University Press.

Rind, G.M., & Knight Abowitz, K. (2022S). Education Reforms and Democracy in Pakistan: The Problem of Privatisation. *Globalisation, Society and Education*, 1-15. https://doi.org/10.1080/14767724.2022.2142934.

Rind, G. M. (2022). *Evaluating the Role and Impact of Public-Private Partnerships in Education in Achieving the Goal of Equitable Access to Quality Education in Sindh, Pakistan* [Doctoral dissertation, Miami University]. OhioLINK Electronic Theses and Dissertations Center. http://rave.ohiolink.edu/etdc/view?acc_num=miami1654644415089149

Rizvi, F. (2007). Postcolonialism and Globalization in Education. In R. S. Coloma (Ed.), *Post-Colonial Challenges in Education* (pp. 256–263).

Rizvi, F., & Lingard, B. (2009). *Globalizing education policy*. Routledge.

Said, E. W. (2003). *Orientalism* (Reprinted with a new preface). Penguin Books.

Shahjahan, R. A. (2012). The Roles of International Organizations (IOs) in Globalizing Higher Education Policy. In J. C. Smart & M. B. Paulsen (Eds.), *Higher Education: Handbook of Theory and Research* (Vol. 27, pp. 369–407). Springer Netherlands. https://doi.org/10.1007/978-94-007-2950-6_8

Spring, J. (2008). Research on Globalization and Education. *Review of Educational Research, 78*(2), 330–363. https://doi.org/10.3102/0034654308317846

Spring, J. (2009). *Globalization of education: An introduction*. Routledge.

Steiner-Khamsi, G. (2016). Standards are good (for) business: Standardised comparison and the private sector in education. *Globalisation, Societies and Education, 14*(2), 161–182. https://doi.org/10.1080/14767724.2015.1014883

Steiner-Khamsi, G., & Waldow, F. (Eds.). (2012). *Policy borrowing and lending in education*. Routledge.

Verger, A., Fontdevila, C., & Zancajo, A. (2016). *The privatization of education. [electronic resource]: A political economy of global education reform* (Electronic Resource LB2806.36. V48 2016eb). Teachers College Press, [2016].

Young, R. (2016). *Postcolonialism: An historical introduction* (15th Anniversary ed). Wiley Blackwell.

Beyond Demographic Identifiers and Classification: A Search for Alternative Approaches to Quantitatively Evaluating Educational Equity

Grace Pai, Ph.D.
Queens College, City University of New York (CUNY)

In April 2022, United States Agency for International Development (USAID) released its first ever Equity Action Plan to advance equity across their policies, programs, and partner base. This action plan entails five priority areas, the fifth of which is to: "…incorporate racial and ethnic equity and diversity into policy, planning, and learning" (USAID, 2022, para. 3). This essay addresses the question of how USAID, along with other international development agencies and practitioners, can institutionalize equity, particularly in its evaluation and data collection processes. I argue that as interest in addressing diversity, equity, and inclusion (DEI)[1] increases in the U.S. and parts of Europe, Western conceptualizations of equity need careful examination regarding their cultural appropriateness, lest we impose these values on other regions of the world. Furthermore, we need to be wary of pushing "conventional" methods and metrics used for evaluations of the outcomes.

In the Global North, equity is typically assessed on a large-scale through collecting data and disaggregating results to look for significant differences between demographic groups like race and gender. Underlying this approach is the notion that there should be fair distribution or parity in outcomes between groups. However, the key methodological assumption is that we have individual identifiers enabling us to create demographic groups. Such categorization makes this practice and approach inappropriate to many communities who may be under duress and/or who for the sake of personal protection, need to maintain privacy through non-disclosure. For example, I have worked with international partners who expressed their inability to include questions about ethnicities in a survey. Even if the surveys were anonymized and questions were made optional, the respondents could still bear the risk of political persecution by answering such identifying questions. One finding from focus groups in the USAID 200-day equity assessment corroborates this concern:

> "efforts to understand our partners and beneficiaries must be done responsibly in a manner that will not cause unintended consequences/harm for marginalized individuals; for instance, answering a question on gender identity could put respondents at risk in certain country contexts" (USAID, 2021, p. 11).

---

[1] Other acronyms for DEI include EDI, IDEA (inclusion, diversity, equity and access), or AIDE.

However, this is followed by a recommendation to "include targeting more granular forms of data collection in programming and planning that account for marginalization within a country context…These include, but are not limited to, data collection on disability and on the full spectrum of gender identities and ethnicity" (USAID, 2021, p. 11). Although the recommendation continues to suggest that "efforts could include appropriate data protection and privacy protocols within the technology solution design" (ibid), I argue that relying on technology-driven protocols for privacy does not resolve the root problem of the potential cultural inappropriateness of collecting identifying data on marginalized populations. Instead, I review other ways to conceive of equity, along with a culturally responsive methodology that does not require the Western-centric criteria to quantify equity.[2]

Concepts of equity
At its etymological root, equity means fair and even. Embedded in the principles of equality and justice, equity is premised upon the assumption of a natural human hierarchy (Lewis et al., 2021). It was not until the 18th century that moral equality was introduced in the West, establishing that all human beings are created equal. Since then, many theories on the philosophical nature of moral equality have been advanced. One of the most cited is John Rawls' *Justice as Fairness. He* adopted a prioritarianist view of equity consisting of equal access to opportunities and a difference-based consideration of the most disadvantaged (Rawls, 2001). In the past two decades, capabilities approach advanced by Amartya Sen (1999) and Martha Nussbaum (2000) have opened up new ways of answering the questions regarding equity. Namely, Sen (1999) addressed the equity of individual freedom to social, economic, and political participation; Nussbaum (2000) enlisted the core elements in basic human capabilities and rights. Their work has garnered a paradigm shift to the improvement of individual capabilities, or what an individual can do or can be, rather than what they have done or have become (Robeyns, 2005).

These dominant conceptions of equity, however, have overshadowed non-Western equity frameworks. Although eliding women, Confucius in the 5-6th century BC proposed "有教无类" (education without distinction). This notion calls for the development of citizens, ethnic minorities, and slaves who were excluded from aristocratic education into well-rounded individuals (Mu et al., 2013). In Islam, there is not a separate theory of justice since the Qur'an itself assures justice as a natural outcome so long as the rulers and people comply with divine rules (Mirakhor & Askari, 2019). Bedouin concepts of equity are grounded in preserving honor, pride, and peace (Wolf, 2000). On the other hand, Amazonian conceptions of equality flout the absolute equivalence among people; instead, they emphasize on respect, individual differences, and partiality over equality, fairness, and justice (Walker, 2020).

Within the field of education, the production of the term equity has exponentially increased since 2005 (Jurado de los Santos, 2020). As it gains in popularity, the concept itself has gotten muddled in debates over whether equity should be applied horizontally (i.e. equal treatment of equals) or vertically (i.e. unequal treatment of unequals) to areas

---

[2] I purposefully constrain this essay to only discuss *quantitative* and not qualitative evaluations of equity.

like school funding (Toutkoushian & Michael, 2007), and whether the goal is to strive for equality in opportunity and treatment versus equality in outcomes (McCowan, 2016). Levinson et al.'s (2022) recent essay dissected the competing and often contradictory ways in which educational equity is framed: "equality of educational *resources* across comparison sets, equal *distribution* of educational outcomes across populations, equal *outcomes* for every learner, equal educational *experiences* for each child, or equal levels of *growth* or *development* for each learner" (p. 2). The myriad applications of equity serve as a reminder that the multi-faceted concept of equity needs clarification before even broaching the question of how to operationalize and instrumentalize an evaluation of equity.

Alternative approaches to quantitatively evaluating equity in practice
In practice, quantitative evaluations of equity often measure proportional equality through testing. Conventional norms in the U.S. assume and apply social categories such as race and gender – which are perceived sources of disparities across a wide array of societal outcomes in the U.S. – to identify the least-advantaged groups. Individuals are then ascribed to these groups largely through self-reported identification. However, I contend that there may be, and must be, alternative evaluations of equity for instances where responses to demographic questions can place an individual at risk of personal persecution. I provide three examples below.

Collaboratively search for culturally relevant and acceptable forms of identification
First, I argue that a researcher entering and evaluating equity in another culture could begin by collaborating with partner organizations to assess context-specific metrics relevant to local structural inequalities. These questions are appropriate to ask about the particular culture. For example, in certain parts of the Middle East where ethnically minoritized individuals (compounded by the intersectionality with other minoritized identities) can face persecution for what they report, what are the alternative forms of equity that a partner organization care more about? The principle of equity is known to be valued and prevalent throughout Islam; Rahim and Mohammed (2018) pointed out that justice and equity, which respectively align with the Islamic concepts of *adl* and *qist*, appear 174 times in the Qur'an. Moreover, many of these references relate to distributive justice between the rich and poor – a value that undergirds Islamic economics (Choudhury, 1983; Hashmi, 2010). To this end, perhaps questions about financial capabilities to meet basic necessities may not only be of relevance and interest, but also more culturally respectful to the host countries and partners.

Changing the focus from group identification to individual capability
When demographic identification of any kind is not possible, another option might be to deviate from the dominant difference-based approach to the alternative capability approach to examine relationships between relevant variables and individual capabilities. Capability theory approaches justice through the question of what is an individual potentially capable of, and how can they reach that goal? According to Robeyns (2005), "what is ultimately important is that people have the freedoms or valuable opportunities (capabilities) to lead the kind of lives they want to lead, to do what they want to do and be the person they want to be" (p. 95). The theory, however, has been critiqued for being too individualistic and insufficient in addressing groups or social contexts and structures (Robeyns, 2005). For example, some have argued that the

utilitarian individualism underlying capability theory elides the "structures of living together" (Stewart & Deneulin, 2002, p. 66) and is inappropriate for examining societal well-being (Gore, 1997). An alternative approach to evaluating equity in ambiguous contexts is to reconcile the debate and mediate social context or groups via individual capabilities. Then, we can proceed to analyze the association between individual capabilities and equity in the domain of interest. For example, a study of educational equity drawing on survey data could include a set of questions about human capabilities such as health, nourishment, community participation, and access to resources. An analysis could then entail the assessment of significant differences in educational outcomes based on average capabilities. In theory, there should be no correlation between the two if systemic equity exists in that context.

Finding proxies of the constructs underlying systemic inequalities
Similarly, another consideration might be to measure the constructs underlying structural inequities as a proxy of demographic identifiers. Inherent to the U.S. practice of racially disaggregating data is the knowledge of systemic injustices that stems from the classifications such as race, gender, sexuality, disability status, and parental education. We know, for example, that people of color, women, LGBTQ+, those who have a disability, and first-generation students, are groups that experience more negative outcomes in the U.S. But underlying these systemic inequalities are feelings of unbelonging or experiences of marginalization and discrimination. Rather than asking for demographic identification, for instance, researchers can include a set of validated survey items measuring social belonging and assess equity based on differences in the levels of societal belonging and inclusion.[3] This comes with its own limitations, such as bias from self-reporting and relying on subjective perceptions, as opposed to "objective" demographic categories. However, if demographic categories like race are social constructs anyway, how objective are they really?

In conclusion, this essay reminds researchers that a concept like equity, along with the ways it is assessed, is not universal. As Levinson et al. (2022) reminded us, it is imperative to first clarify what we are valuing and seeking when we aim for educational equity. And as these Western-centric DEI values are exported, we must go further to reflect on the cross-cultural appropriateness of these practices and push ourselves to consider other ways of evaluating the goal of equity at scale.

Grace Pai, *Ph.D. is an Assistant Professor in the Elementary and Early Childhood Education department at Queens College in the City University of New York (CUNY). Her research focuses on educational equity across a range of disciplines from mathematics education to international education.*

---

[3] Cordier et al. (2017) conducted a systematic review of literature on measures of social inclusion and found that the *Social and Community Opportunities Profile-Short* best captured the construct of social inclusion.

References

Choudhury, M. A. (1983). Principles of Islamic economics. *Middle Eastern Studies*, *19*(1), 93-103. https://www.jstor.org/stable/4282924

Cordier, R., Milbourn, B., Martin, R., Buchanan, A., Chung, D., & Speyer, R. (2017). A systematic review evaluating the psychometric properties of measures of social inclusion. *PLoS ONE*, *12*(6), e0179109. https://doi.org/10.1371/journal.pone.0179109

Gore, C. (1997). Irreducibly social goods and the informational basis of Amartya Sen's capability approach. *Journal of International Development*, *9*(2), 235-250. https://doi.org/10.1002/(SICI)1099-1328(199703)9:2<235::AID-JID436>3.0.CO;2-J

Hashmi, S. H. (2010). The problem of poverty in Islamic ethics. In W. A. Galston & P. H. Hoffenberg (Eds.), *Poverty and Morality* (pp. 180–203). Cambridge University Press. doi:10.1017/CBO9780511779084.010

Jurado de los Santos, P., Moreno-Guerrero, A. J., Marín-Marín, J. A., & Soler Costa, R. (2020). The term equity in education: A literature review with scientific mapping in web of science. *International Journal of Environmental Research and Public Health*, *17*(10), 3526. https://doi.org/10.3390/ijerph17103526

Levinson, M., Geron, T., & Brighouse, H. (2022). Conceptions of Educational Equity. *AERA Open*, *8*(1), 1-12. https://doi.org/10.1177/23328584221121344

Lewis, E. O. C., MacKenzie, D., & Kaminsky, J. (2021). Exploring equity: How equity norms have been applied implicitly and explicitly in transportation research and practice. *Transportation research interdisciplinary perspectives*, 9, 100332. https://doi.org/10.1016/j.trip.2021.100332

McCowan, T. (2016). Three dimensions of equity of access to higher education. *Compare: A Journal of Comparative and International Education*, *46*(4), 645-665. https://doi.org/10.1080/03057925.2015.1043237

Mirakhor, A., & Askari, H. (2019). *Conceptions of Justice from Earliest History to Islam*. Palgrave Macmillan. https://doi.org/10.1057/978-1-137-54303-5

Mu, G. M., Zheng, X., Jia, N., Li, X., Wang, S., Chen, Y., & Diezmann, C. (2013). Revisiting educational equity and quality in China through Confucianism, policy, research, and practice. *The Australian Educational Researcher*, *40*(3), 373-389. https://doi.org/10.1007/s13384-013-0113-0

Nussbaum, M. (2000). *Women and Human Development: The Capabilities Approach.* Cambridge University Press. Introduction, Chapter 1. https://doi.org/10.1017/CBO9780511841286

Rahim, S., & Mohammed, M. O. (2018). Operationalizing distributive justice from the perspective of Islamic economics. *International Journal of Economics, Management and Accounting*, 26(2), 415-442. https://journals.iium.edu.my/enmjournal/index.php/enmj/article/view/431

Rawls, J. (2001). *Justice as fairness: A restatement*. Harvard University Press. doi: 10.1093/mind/112.447.563

Robeyns, I. (2005). The capability approach: a theoretical survey. *Journal of human development*, 6(1), 93-117. https://doi.org/10.1080/146498805200034266

Sen, A. (1999). *Development as freedom*. Oxford University Press.

Stewart, F., & Deneulin, S. (2002). Amartya Sen's contribution to development thinking. *Studies in Comparative International Development*, 37(2), 61-70. https://doi.org/10.1007/BF02686262

Toutkoushian, R. K., & Michael, R. S. (2007). An alternative approach to measuring horizontal and vertical equity in school funding. *Journal of Education Finance*, 32(4), 395-421. https://www.jstor.org/stable/40704304

USAID. (2021, August). USAID 200-day Progress Report on Equity Assessments. November 12, 2022. https://www.usaid.gov/sites/default/files/documents/08.09_Final_200_Day_Equity_Progress_Report_.pdf

USAID. (2022, April 14). RELEASE OF USAID EQUITY ACTION PLAN. November 11, 2022. https://www.usaid.gov/news-information/press-releases/apr-14-2022-release-usaid-equity-action-plan

Walker, H. (2020). Equality without equivalence: an anthropology of the common. *Journal of the Royal Anthropological Institute*, 26(1), 146-166. https://doi.org/10.1111/1467-9655.13183

Wolf, A. T. (2000). Indigenous approaches to water conflict negotiations and implications for international waters. *International Negotiation*, 5(2), 357-373. https://doi.org/10.1163/15718060020848802

Integrating Technology in English Language Arts Teacher Education: A Book Review

Honey Walrond
Teachers College, Columbia University

Integrating Technology in English Language Arts Teacher Education: A Book Review
The use of technology in teaching has many skeptics about its advantages and positive impact on teaching. In *Integrating Technology in English Language Arts Teacher Education* (2020), Donna L. Pasternak speaks to the skepticism by examining the challenges and benefits of technology integration in English/English Language Arts classrooms. The study of teaching ELA has changed from an area that defined itself as a subject that teaches composition, literature, and rhetoric to one that teaches abilities needed to learn content such as interpretation, writing, speaking, critical analysis, Etc. (Coiro et al., 2004; National Council of Teachers of English, 2018). Pasternak's central argument is that technology integration and multimodal literacy are vital components of ELA curriculum development and provide clear and practical guidance on technology integration for prospective teachers of English in U.S. teacher education programs.

The book is organized into five chapters, each providing a framework for ELA instructors and teachers in other content areas to integrate technology and improve digital literacy skills. Chapter one discusses national learning and the challenges encountered while integrating technology. Chapter two covers the tension in the field and reflects on the potential for technology to replace traditional teaching methods. Chapter three explores technology integration into methods courses and examines how teacher educators guide their trainees in the use of technology. Chapter four describes the technologies pre-service teachers need to know to acquire the content of ELA methods. Furthermore, finally, chapter five describes how technology has transformed ELA students and the impact of technology in the classroom.

One of the book's significant concerns is that despite technology's role in instruction, it is still referred to as a "tool" (p. 77) in the narratives and assignment rubrics, replicating the traditional pen-and-paper approach. The book speaks to these concerns, which is also one of its strengths, by providing straightforward and practical case studies on technology integration in the ELA classroom. Pasternak provides clear and actionable examples from the case studies on how ELA teachers integrate technology into their classrooms. In one case study, a teacher used digital storytelling tools to help students create their own narratives using a combination of text, images, and sound (p. 64). A second case study highlighted how a teacher used online discussion forums to facilitate deeper analysis and reflection on texts (p. 85). The teacher in the case study provided examples of strong discussion posts and helped ELA students learn how to engage in meaningful online conversations.

Another strength of the book is the focus on best practices for using technology in the ELA classroom, such as emphasizing the importance of using technology in a purposeful way rather than just for the sake of using technology. This helps ensure that technology is being used effectively to support student learning. For example, Pasternak discusses how some teachers fall into the trap of using technology for its own sake, such as having students create digital presentations just because they can (p. 30). Instead, Pasternak emphasizes examples that show the importance of choosing technology tools that support specific learning objectives and helps students achieve a deeper understanding of ELA concepts (pp. 61-72), which promotes active learning and student engagement. Finally, Pasternak cites research showing that technology can be especially effective in fostering student collaboration and communication and encourages teachers to incorporate these strategies into their teaching (p. 46; p. 92).

While *Integrating Technology in the English Language Arts Classroom* is a valuable resource for ELA teachers and teacher educators, one area where the book could be improved is its treatment of the latest discussions around Artificial Intelligence (AI) and its impact on teaching English. As AI continues to advance, it is becoming increasingly important for teachers and teacher educators to understand how it can be used to enhance their teaching practices and support student learning. For example, AI can analyze student writing and provide feedback on grammar, spelling, and sentence structure (Dong et al., 2022) and develop students' AI Literacy through the power of digital story writing (Ng et al., 2022). Unfortunately, Pasternak does not provide much discussion or guidance on how to incorporate AI into the classroom. As AI continues to advance and become more prevalent in education, it is essential for ELA teachers to be aware of its potential applications and to learn how to integrate it effectively into their teaching practices. Therefore, the book could be updated to include more discussion and practical guidance on the use of AI in the ELA classroom.

Overall, *Integrating Technology in English Language Arts Teacher Education* provides different levels of understanding about technology and how ELA teachers can incorporate it into their classrooms. The book aims to show how tensions/ideas are presented in the English education field and provides clear and practical guidance on technology integration for prospective teachers of English. Pasternak emphasizes the importance of using technology purposefully rather than just for the sake of using technology and provides actionable examples from case studies on how ELA teachers can integrate technology into their classrooms. Despite its limitations, this book is a valuable resource for ELA teachers and teacher educators who seek to incorporate technology into their curriculum development.

Honey Walrond *is an Instructor and Doctoral Ph.D. Fellow in the English Education program at Teachers College, Columbia University, with a second concentration in Education Policy. She teaches courses on culturally relevant literature and literacy practices and her research centers on literacy and literacy education policies. Honey can be reached at honey.walrond@tc.columbia.edu.*

References

Coiro, J., Knobel, M., Lankshear, C., & Leu, D. J. (Eds.). (2014). *Handbook of research on new literacies*. Routledge.

Dong, Y., Yu, X., Alharbi, A., S. Ahmad. AI-based production and application of English multimode online reading using multi-criteria decision support system, *Soft Computing*, *26*(20), 10927–10937 (2022). https://doi.org/10.1007/s00500-022-07209-2

National Council of Teachers of English. (2018). *Beliefs about Technology and Preparation of English Teachers*. NCTE. https://ncte.org/statement/beliefs-technology-preparation-english-teachers/

Ng, T. K., Chan, H., & Chu, S. (2022). An examination on primary students' development in AI literacy through digital story writing. *Computers and Education: Artificial Intelligence.*

Pasternak, D. L. (2020). *Integrating Technology in English Language Arts Teacher Education*. Routledge.