

Mediterranean Studies
in Comparative Education

edited by
Carmel Borg
Peter Mayo and
Ronald G. Sultana

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EDITORS

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Introduction

The Mediterranean Society of Comparative Education (MESCE) was born in Catania, Sicily as a result of the vision and enthusiasm of a Sicilian scholar, Giovanni Pampanini who became the society's first President. He gathered a group of scholars in this city to help put together, in 2004, the Society's first conference. The network of people involved in this area of educational enquiry continued to grow and by the time the second MESCE Conference took place in Alexandria, Egypt in 2006 this society had already begun to make its mark in the international comparative education field. It had become a member of the World Council of Comparative Education Societies (WCCES) and was designated regional host for the 2007 World Congress of Comparative Education which took place in Sarajevo. The idea to host the congress there was proposed by Giovanni Pampanini at the WCCES Conference in Cuba in the Fall of 2004. The Sarajevo congress was soon followed, between 11-13 May, 2008, with the largest MESCE conference to date, held this time in Malta. This conference drew interest from various parts of the world and not just from the Mediterranean region. Keynote speakers were chosen from different corners of the Mediterranean including the Southern and Eastern Mediterranean and also included the Editor of *Comparative Education Review*.

Meanwhile the Euro-Mediterranean Centre for Educational Research (EMCER), at the University of Malta, directed by Ronald Sultana, and which produces the *Mediterranean Journal of Educational Studies* (MJES), began to work closely with MESCE and this book is very much the product of this collaboration. It should serve as a testimony to the Malta conference since it contains five keynote presentations and an additional paper presented at the conference.

The two conference convenors, who now occupy the posts of President and Secretary General of MESCE, join Ronald Sultana, a keynote speaker at the conference, in editing this book. This work follows closely on the establishment of a MESCE website that includes a variety of resources, both visual and audio. Together with the MJES, which is strongly being supported by the society, this website is intended to serve as a point of contact for comparative and other educational and social science researchers ensconced within and beyond the region.

The Malta conference bore the title of 'Intercultural Dialogue through Education', and addressed two broad themes, namely, 'Intercultural Dialogue Within and Across Nations' and 'Education in the Mediterranean'. Other related themes included: post-colonial education; religion and education; multi-ethnicity

and education; migration – inward and outward; North-South, South-North, East-West, West-East relations in education; and education for sustainability in the Mediterranean and beyond. Some of these broad themes are reflected in the chapters included in this volume.

Ronald Sultana's chapter testifies to his standing and wide experiences in the field. It takes us through a 15-year, autobiographical journey in the areas of research and coordination of comparative education projects. Sultana's personal account identifies the limits and explores the possibilities of doing comparative research in the region. It also provides signposts for future research.

JosAnn Cutajar focuses on one of Sultana's major concerns, namely the dependence of academics and academic institutions, found in small or intermediately developed countries, such as Malta, on Western-derived epistemologies and research. Cutajar argues that such dependence perpetuates subalternity. She proposes a post-colonial pedagogical strategy as a potential antidote to neo-colonial discourses.

One other chapter by a Maltese scholar is that offered by Isabelle Calleja from the University of Malta's Department of International Relations. Her chapter however focuses not on her home country but on the Cypriot conflict, which she has been researching on site for years. It is common knowledge that this conflict has physically divided the Turkish-Greek communities for more than thirty years. Calleja provides us with a study of the transformation experienced in the teaching of the History of Cyprus, as the country evolved from a long period of geo-political transformation, characterised by national, political and ideological division of the island, to a period marked by genuine attempts at border crossing and at a permanent solution to the crisis.

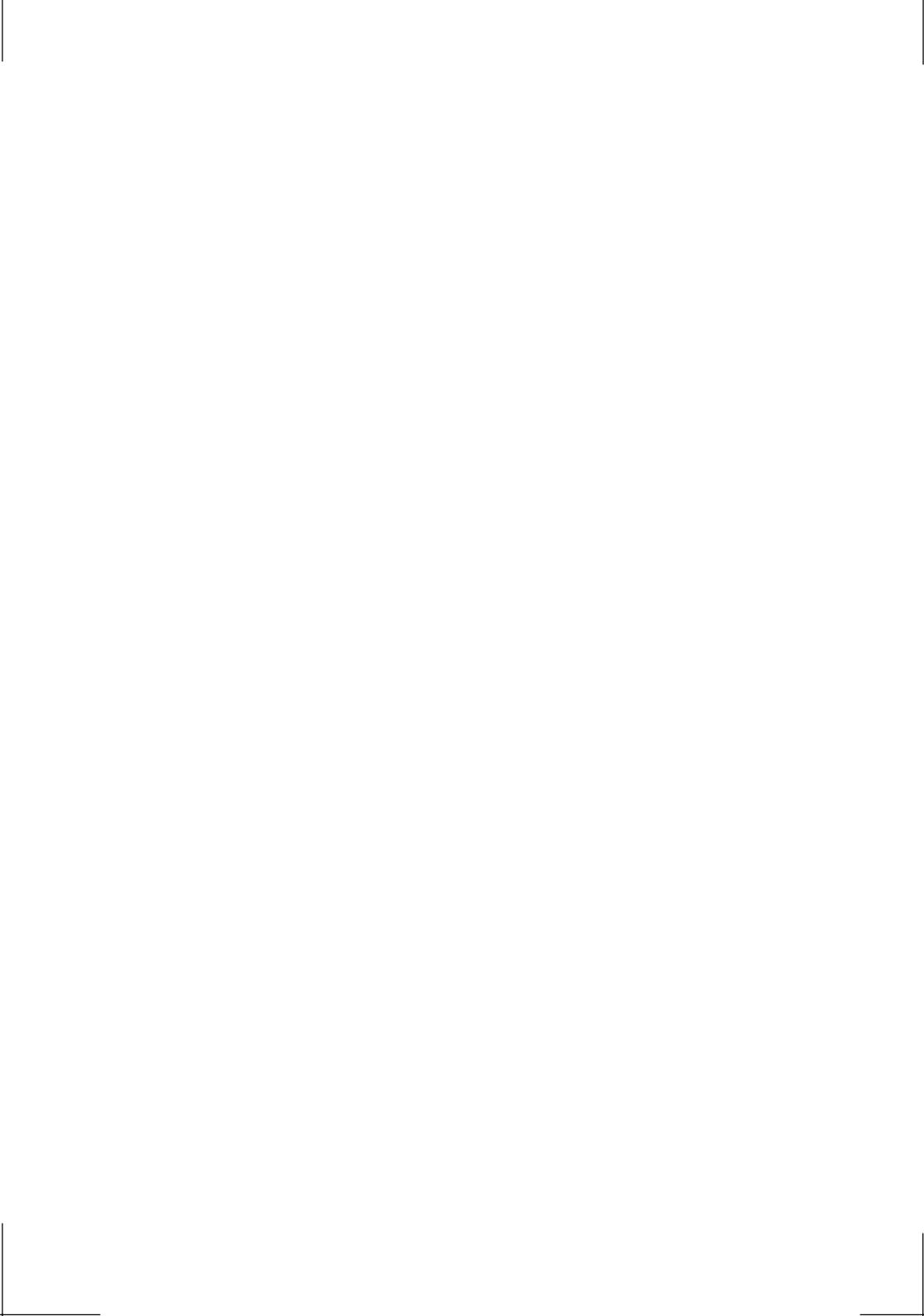
The Palestinian and Sudanese conflicts provide the backdrop for Mazawi's analysis of some of the context-dependent dynamics that affect teachers' lives and work. His cursory review unearths two disturbing truths: the absence of studies of educators' lives and work in the Arab region, exacerbated by the uncritical importation of models of 'educational leadership'; and the tourist-gaze approach to the construction of educators' work in the region. Mazawi, like Sultana and Cutajar, calls for a new research agenda that is critically engaged and contextually grounded; research projects that foreground educators' lives and work in the Arab region.

The work by CER Editor, Mark Ginsburg, from the USA, and Nagwa Megahed, from Egypt, examines the intersection of global discourses regarding student-centred and active-learning pedagogies with educational reform initiatives in Egypt. Ginsburg and Megahed's chapter invites comparative and international educators to problematise how local, national and global discourses are constrained or empowered by global and economic developments, including initiatives disguised as 'democratisation' and economic liberalisation.

The final chapter is by Paolo Landri, a sociologist and educational researcher from Naples who is deeply involved in the Italian and international sociology of education scenes and has recently been instrumental in establishing an Italian Sociology of Education journal. In his chapter, he focuses on emerging forms of governance of schooling in countries experiencing what he refers to as the southern model of welfare state – Spain, Portugal, Greece and Italy. Landri's work describes the countries' performances and highlights some of the differences experienced in their attempt to translate into action aspects of decentralisation.

This book favours the search for Mediterranean epistemologies. It promotes the concerns of researchers who are interested in transforming the comparative education scene rather than adapting to it. This volume confirms that the dream of relocating the roots of discourses in comparative education is possible.

Carmel Borg
Peter Mayo
Ronald G. Sultana



CHAPTER 1

Looking Back Before Moving Forward: Building on 15 Years of Comparative Educational Research in the Mediterranean¹

RONALD G. SULTANA

This chapter considers some of the promises and challenges in doing comparative education in the Mediterranean region. The focus on the Mediterranean is, in many ways, a wager, in that the region is rather more notable for its diversity than for its commonalities. Nevertheless, it is argued that comparative education goes – or should go – beyond the positivist concern with comparing ‘like with like’. Rather, it is more about finding a standpoint from where educational and related social phenomena can be seen from a different perspective, generating a deeper understanding of dynamics, as well as fresh insights. It is argued that the adoption of a Mediterranean lens facilitates this process, though there are distinctive challenges that arise. Building on 15 years experience in carrying out and co-ordinating comparative education projects in the region, the chapter outlines both the promise and pitfalls of the endeavour, and traces an agenda for future research.

Introduction

In addressing the theme of comparative education in the Mediterranean, it seems to me to be both necessary and useful to provide a context. I want to do so in a particularly personal and ‘narrational’ manner, drawing on qualitative case studies I have carried out in the region, as well as the structured attempt, through our Euro-Mediterranean Centre for Educational Research (EMCER), to develop Mediterranean comparative studies as a generative endeavour. In so doing, I also want to introduce readers to aspects of Malta’s culture and history, which, as will be seen, are what made me who I am and have also had a decisive impact on my approach to scholarly work in our region. This attempt to link culture, identity and scholarship seems to me the best way to not only address this emergent field of Mediterranean comparative education, but also to link it to the specific focus of the conference, namely ‘intercultural dialogue through education’. What I hope to do, therefore, is to draw on my personal experiences over the last 15 years as a comparativist, highlighting the academic as well as the personal and cultural identity challenges that this endeavour represented for me, with a view to identifying three key obstacles that I see ahead of us in this regional venture, while outlining some agendas for the future.

Culture, identity and scholarship

My experiences as an educational researcher in the region are of two kinds. The first set of experiences that I would like to refer to consists of the qualitative studies that I have carried out over the past decade, at the behest of international organisations such as UNICEF, UNESCO and the European Training Foundation. My research has taken me to Albania, Egypt, Syria, Tunisia, Turkey, Palestine, Jordan, and to a more limited extent to Lebanon and Morocco. Some of these studies have a single country focus. Others – like the recent study of career guidance across ten countries and territories in the Middle East and North Africa region (Sultana & Watts, 2007, 2008) – are comparative in scope. Most involved writing case studies of educational innovation, which served as testimonies to home-grown education success stories in the region. As I have argued elsewhere, we need these stories of success, not least as a way of ‘writing back’ to an international community that has tended to see educational development in the region almost exclusively in deficit terms.

In my work, I have written about efforts to integrate low achieving students in state schools across the poorest regions in Albania (Sultana, 2006a); I have documented how girl-friendly community schools are managing to overcome traditional prejudice in remote, rural areas in several governorates in Egypt, where Muslim and Coptic parents now agree to keep their daughters in education rather than marrying them off on the onset of puberty (Sultana, 2008a). In another study, I have described how some brave teachers and schools in Syria have dared to go against the grain, adopting critical pedagogies in order to ensure that their students experience – and develop a taste for – democracy (Sultana, 2001a). In Tunisia, I have tried to capture the rise of mastery learning as a movement to guarantee access, for all children, to a minimum standard of education, even when they live in the remotest villages on the borders with Algeria, in the desert-like environment in Kef and Kasserine (Sultana, 2004, 2005). In a comparative study I have recently carried out, I looked closely at the education policy implementation process in Albania, Kosovo and Turkey, in an attempt to understand how reforms change schools, or should I say, how schools change reforms (Sultana, 2008b).

The place I have visited most remains Palestine – a country that I always go to with hope, but from which I increasingly depart with a heavy heart if not despair, as I see people fenced in, communities fragmented, and human rights trampled underfoot with impunity. In Palestine I documented the setting up of a most impressive Education Management Information System, meant to support the efficient implementation of an ambitious and sound education plan as well as a new ‘national’ curriculum – not an easy task in one of the few territories in the world where communities live in areas that are not contiguous to each other

(Sultana, 2002a). In another study, I tried to capture the ingenuity of the Palestinian people in Hebron, in their effort to ensure that their children retained access to education, despite the curfews, attacks on schools, and mobility restrictions imposed by Israeli forces after the second *Intifada* (Sultana, 2006b). The Hebronites' use of basic distance education methods has proved inspirational to other societies in conflict, where schools and teachers are among the first to bear the brunt of aggression. More recently, and in response to an invitation by UNESCO and UNRWA, I have met with students, teachers and parents in refugee camps in the West Bank, in Jordan and in Lebanon – including those living in the infamous Sabra and Shatila camps – in order to evaluate the quality of education that is available to Palestinians born in exile (Sultana, 2007). In Jordan, I have documented an impressively successful parental education initiative, as well as the implementation of the first large-scale Early Childhood Education and Development service in the Arab world (Sultana, 2009).

All of these studies have involved field work, school and classroom observations, interviews with policy makers, teachers, students, parents and other educators. All have had an especially formative influence on me, shaping my perceptions of the educational challenges in the region, as well as of the resources that the region has in meeting such challenges. I will return to these studies at a later stage in my chapter, with a view to highlighting some of the lessons that can be distilled from them with comparative education in mind.

The second set of professional experiences that connect me to the Mediterranean revolves around the setting up of a comparative education programme at the University of Malta 15 years ago. The story behind the setting up of this programme, which has now matured into a modest research centre, is relevant to this chapter for more than one reason. It must be immediately said that the initial motivation behind establishing the programme were less than pure – as very little in academia is nowadays. The University of Malta, as indeed the rest of the island, had made a strategic decision in the mid-80s to implement the 'hub' concept in an effort to use its position in the middle of the Mediterranean to provide goods and services to the surrounding countries.

This hub concept was applied to several sectors of the economy – leading to the setting up of a Freeport, the building of a new international airport, and the rapid development of financial and offshore services. The concept was also to be implemented in the higher education sector, with the University set to expand and to attract fee-paying students from the surrounding countries, having, as a major advantage, the use of English as the language of instruction. In parenthesis, it must be said that the articulation of a Mediterranean agenda for the University has long, historical roots (Fiorini, 2001). When it was first set up as a Jesuit College in 1592, one of the motives behind the move was to enable Malta-trained European

missionaries to move to North Africa to help spread Catholicism. Later, in the early 19th century, there were plans to establish Malta as a seat of learning in the Mediterranean, with a proposal to open a second university on the smaller island of Gozo tabled in 1818. One hundred and fifty years later, academics were again encouraged to focus on Mediterranean studies, or to introduce a Mediterranean dimension in their teaching and research, in some cases building on an already established and modest – but nevertheless international – reputation in some areas, notably anthropology, but also law, literature, and theology.

This also fed into a widespread fantasy that the Maltese have of themselves, namely that puny Malta can act as a bridge between North Africa and Europe, when in fact our history shows that what we have done best is to act as a bulwark to keep ‘non-Europeans’ – whoever these are – (and Islam) out of Europe² – a vocation that, might I add, we ironically seem to have revived with a vengeance when, following our entry into the EU in 2004, we became a vital outpost in helping the EU secure its borders through collaborating on Frontex³ operations. In this way, the Mediterranean sea, which for centuries has acted as the main vehicle of communication between the basin’s north and south, east and west, is now traversed by an invisible but no less effective replica of the Berlin wall, infused by the Schengen⁴ spirit which strives to keep the frontiers of fortress Europe intact and the boatpeople at bay.

This University-driven Mediterranean agenda coincided with other aspects of my own personal history as an academic: my ego had taken several blows at conferences where few, if any, ever turned up to listen to papers I had prepared on educational issues pertaining specifically to Malta. Few, if any, felt that what happened in a country barely larger than a mid-sized European town, with a population of less than 400,000, had any relevance to them or their own work. The new research agenda proposed by the University, therefore, promised to expand my horizons from a too narrow focus on Malta toward a wider-embracing comparative gaze at the rest of the region. With the hope, therefore, of becoming somebody at the university, and somebody at international conferences and the academic stage more generally, I embarked on this Mediterranean Odyssean voyage, little knowing where it would lead to, which dangers were lurking below the shimmering surface, which short-sighted (or should I say one-eyed) cyclopean university authority would try to block me or administer me to death, and which Sirens would attempt to lure me off track.

Initial efforts were promising. I recall being encouraged by the likes of the Sicilian Giovanni Pampanini, who had already been fighting windmills, so to speak, in his quixotic efforts to stimulate interest in a Mediterranean comparative dimension. Another key influence was Marco Todeschini, erstwhile professor of comparative education at the University of Milan, Italy.

Together with the support of colleagues from the Faculty of Education in Malta, and some seed funding from UNESCO, I established an extensive network of educational researchers from all over the region, creating a database that profiled their academic background and expertise with a view to facilitating collaborative projects. Different members of this network met annually at small, intimate conferences in Malta, Florence, Cyprus and elsewhere, were we focused on such issues as higher education (Guri-Rosenblit & Sultana, 1999; Sultana, 1999), educational innovation (Sultana, 2001b), teacher education (Sultana, 2002b), and power and education (Sabour & Sultana, 2003) – each bringing the experiences of his or her own country, and sharing them in intensive debating sessions that increased our knowledge of each other and provided us with new opportunities for understanding how our respective education systems were marked, for instance, by shared Mediterranean colonial and post- or neo-colonial histories, by the nature of the relations between state, religious power and formal schooling, by cultural traditions that shaped gender boundaries and lifechances in particular ways, and so on.

Different members of this same network also supported the launch of an international journal with a regional focus, the *Mediterranean Journal of Educational Studies* (MJES). Now in its 13th year of publication, the journal, produced, I might add proudly, in cottage industry style, appears twice annually, and with 25 issues behind it, has established itself as a unique venue for scholarship reporting on educational issues in the Mediterranean, and serving subscribers from as far afield as Australia, Russia, the US, China and Japan, not to mention most of Europe, the Middle East and, to a lesser extent, north Africa. We have recently turned it into a free open-access online journal, hoping to reach out to more academic communities, particularly as we notice that those who we most want to engage in our region are the ones with the least resources to subscribe, despite the advantageous fee structures we have put into place for low income countries. It is for this reason too that we have thus far resisted requests by major journal publishing companies to sell them our journal, fearing that, despite the undeniable benefits of international market penetration and prestige that they offer, the profit motive will keep the market price high, excluding those who we most wish to reach.

This very productive interaction between like-minded scholars from the region, together with the knowledge resources that have accumulated in our Centre, led to the launch of a master's degree focusing on comparative education in the Mediterranean – to our knowledge, the first master's of its kind, now being offered to a second cohort of students. We hope to build on this experience in order to open it up to students from all over the region, particularly if we manage to secure sponsorships and scholarships from the sources we are tapping.

I cannot stress enough how pivotal and compelling both these sets of overlapping experiences – that is, both the qualitative research I carried out in the region and the setting up of a Mediterranean comparative education research centre – have been for me *academically* and *personally*.

Let me first focus a little on the impact they have had on my academic work, and particularly on my understanding of educational issues. Prior to the start of this Mediterranean journey, I had been happily looking at educational phenomena in Malta through the theoretical and conceptual lenses provided by mainstream, metropole scholars – particularly Anglo-Saxon ones, and to a lesser extent continental ones such as Bourdieu or Habermas, often through translations or commentaries in English. Needless to say, these remain giants on whose shoulders we need to climb. Nevertheless, my qualitative research in the region soon made it clear to me that the contexts from which metropole frameworks arose differed from those that we are embedded in in the economic and geographic ‘South’. The comparative educational work I was doing with colleagues pointed out the need for developing a greater sensitivity to the fact that the economic, cultural, political and social dynamics in the so-called ‘periphery’ and ‘semi-periphery’ have their own specificity, and require more context-sensitive theoretical tools in order to carry out the Freirian task of reading or decoding our world ... with a view, of course, to contribute to the writing of a different text.

Some of the colleagues engaged in this effort to develop theoretical understandings of educational issues in the Mediterranean have been particularly successful in working both with and against mainstream sociological frameworks, developing sophisticated and nuanced understandings of educational issues. The Catalan Xavier Bonal, for instance, the Palestinian André Mazawi, as well as Linda Herrera and my colleague Peter Mayo – all of whom have served generously on the editorial board of our journal – have written some excellent sociological papers on a variety of aspects of education in the Mediterranean, and are in a way exceptional in that their work has attained visibility in both North and South. But there is much, out there, in education, as in other disciplines, that is written in ways that connect in an especially profound and visceral way with our realities – even if those writings predictably fail to capture the attention of metropole publishers and their public.

Earlier I said that the experience of developing a Mediterranean comparative education dimension has had an impact on me both academically and personally. I have dealt a little with the former, and about that even more later. I must, however, dwell a little on the impact all this has had on my sense of who I am. The conference focus is, after all, on ‘intercultural dialogue’, and what is ‘culture’ but the cultivation of a sense of self within broadening circles of overlapping communities? This word ‘intercultural’ – like its relative term ‘cross-cultural’ – is

a bit tricky: it tends to project an image of essentialised and stable entities – reified national cultures that, at the best of times, are prepared to converse with each other (Bensalah & Daniel, 2003). This is a potentially dangerous conception, which plays into the same ideological terrain of that powerful myth that has captured our imaginary, namely the infamous ‘clash of civilisations’. Cultures, to my mind, are complex historical mongrels whose very being is permeated to the core by ‘others’ through processes of osmosis and the uncontrollable and permissive intercourse and exchange between peoples. This, too, is my story.

I was brought up in a colonial Malta: independence was still 6 years away when I was born, and some of my earliest imagic memories of my childhood include portraits of a young Queen Elizabeth in my primary school and classrooms, and waving flags and genuflecting in her presence or in the presence of any member of her family who took it upon himself to have a vacation in this island in the sun, often under the guise of a ‘diplomatic mission’ – or perhaps it was the other way round. I recall my father taking me to Valletta to see the changing of the guards in front of the Palace in summer, and standing with him staring in awe at these tall, white Bombay-helmeted men marching in the midday sun – men who somehow managed not to slouch or sweat ... further evidence of their demi-god status. I remember my thin, wizened grandfather in mourning when Mintoff, our then illustrious lion of a prime minister, declared that political independence could not be celebrated until the foreign naval base closed down and the Brits given their marching orders. My grandfather, like many other thousands of Maltese, felt that the island would go to the dogs without the patronage and protection of the Brits, who had ruled with grace and sagacity for 164 years – or so our school textbooks told us. These books indeed told us much about the wondrous British Empire, but precious little about our own history ... and when it did, it was largely to emphasise how Christian we were, how European our roots were, and how glorious we were to resist Islam, the Turks and the Arabs ... conveniently forgetting to tell us that linguistically, culturally, genetically and even religiously, we had absorbed our so-called ‘adversaries’ right into the core of our being. I grew up, therefore, thinking of myself as white, as European, as Christian, and indeed as almost English ... though not quite.

You can imagine, therefore, what a shock it was for me to travel to the UK for my studies at the age of 24, when, climbing a bus in London for the first time, a young, blue-eyed man spat on the floor! So, these demi-gods could be crass at times as well! Oh my! ... It came as a shock to me that when I spoke in what I thought was perfect English, I was barely comprehensible to the real Brits; that I was not as white as I had been led to believe; and that the more I travelled north in Europe, the darker I grew, both literally and figuratively. You can perhaps also imagine the even greater shock I felt when I started my travels in our region three

years later, to discover that Tunisians and Moroccans could understand most of what I told them when I spoke ‘Maltese’, that there are areas in Jerba, Rabat, Beirut, Jaffa, Naples, Valencia, Alexandria or Tripoli which evoke my own childhood in villages in Malta and Gozo: those smells, those colours, those flat-roofed houses, those women talking to each other as they hung the family clothes to dry on rooftops, the sprawl of bodies, those hot nights with windows and doors ajar at cleverly calculated angles to catch the remotest of cool breezes, those scrawny cats running down dark, winding yet comforting alleyways ... No wonder Braudel, in his masterly portrayal of the region, exclaimed ‘A native of the Mediterranean, wherever he (or she) might come from, would never feel out of place in any part of the sea!’ (Braudel, 1992, p. 237).

What started off, for me, as a smart-Alec move to make headway in academia had increasingly become a much more profound journey that was to shape my sense of who I am, as well as my efforts to connect this sense of identity with reality around me, in purposeful, reflective ways. Let me now focus the last part of my address on the lessons I have learnt during this journey, and try to tease out some issues that may have implications for us participants at this conference, as we try to deepen our understanding of what comparative education in the Mediterranean might feel and look like. While describing these experiences, I will simultaneously be articulating elements of an agenda for Mediterranean comparative education for the future. I will only focus on three key issues here, assuming that several others will arise during the debates and discussions we will have during the conference, and hopefully afterward too, once we have returned to our respective homes.

Mediterranean comparative education and apostasy

First, a note about the legitimacy of having the Mediterranean as a unit of analysis in comparative work. I have written at some length about this in other contexts (Sultana, 1998), so I will just trace out what is at stake here. I recall that when I first started talking at gatherings of comparative education scholars about what we were trying to do in Malta, the initial reactions by some of the guru patricians of the field was not only marked by scepticism, but sometimes by outright hostility. Lê Thành Khôi, for instance, dismissed the project, claiming that there are too many differences in the region that we called ‘the Mediterranean’ to make it the object of comparative analyses. His position was that it was legitimate to focus on southern European studies, or Arab region studies, or Middle East studies, but the all-embracing notion of ‘Mediterranean’ could not hold water – at least in scientific terms, of course. Andreas Kazamias, erstwhile President of the

Comparative and International Education Society and emeritus Professor of Education at the University of Wisconsin-Madison and the University of Athens, was initially unconvinced at, as he saw it, this attempt ‘to put the Mediterranean Humpty Dumpty together again!’ (Kazamias, 2001, p. xii). He wondered openly whether this was a wild goose chase, whether the imagined Mediterranean gods were false, and whether the idea of a Mediterranean space was a figment of our imagination. Other reactions were equally barbed: one professor at Notre Dame University in the north of Lebanon felt that what we were trying to do was politically problematic, as it diverted energy and attention away from a focus on Arab issues. A highly esteemed Greek comparativist, Professor Marie Eliou, criticised the attempt to start a journal when there was not yet an established community of scholars behind it. An Italian colleague challenged us to think through the implications of substituting a Euro-centric agenda with a MEDA-centric one, when perhaps what we needed most was a more all-embracing vision of global citizenship.

In many ways, of course, these critiques are not without some justification, and the fact that there have been few if any comparative education studies in the region is portentous. Most international aid agencies and development organisations, as well as research institutes, have, at best, a Middle East and North Africa (MENA), or a South European studies programme. Even those which do claim to focus on the whole region, calling their programmes MEDA, or even Mediterranean – such as the Mediterranean Programme of the Robert Schuman Centre at the European University Institute in Firenze – are often mostly interested in studies of Arab states, using the ‘Mediterranean’ caption interchangeably – and I would dare say, euphemistically – for ‘Arab’. The diversities between – not to mention *within* – countries in the Mediterranean are striking, with significant and cumulative differentials in all or most aspects of economic and social development indices, whether we are talking about demography, access to power resources, the role and place of religion, the status of individuals and their relationship to inalienable rights, and so on. Diverse colonial histories have led to the development of different educational traditions and systems, as well as to country-specific relations with metropole countries, and with the power blocs present in the region, including the US and the EU.

A simple but hopefully not simplistic answer to all this is that what we are most interested in doing in this endeavour that we are referring to as Mediterranean comparative education is not so much as the search for epistemological and positivist purity in comparing ‘like with like’, as much as finding a new standpoint – one among many others, I might add – from where to gaze at phenomena and to apprehend it in new ways, by refracting it through a different lens. As I have already noted earlier with reference to my own personal journey, adopting a

‘Mediterranean perspective’ can open up new opportunities for the generation of more context-specific and context-responsive frameworks that help us make sense of educational dynamics. We have discovered, over the years, how bringing together scholars from different parts of the Mediterranean – Israelis and Palestinians; Croats, Albanians and Serbs; Greeks and Turks (not to mention Greek and Turkish Cypriots); Syrians and Lebanese; Christians, Muslims and Jews of all denominations and shapes and sizes – generates thematic concerns that might not have surfaced otherwise, including notions of our responsibility for future generations which may contrast with our perceived obligations to ensure that, through the curricular narratives we present our children with, they never forget the atrocities we have managed to pile upon each other across time and space.

We would also do well to keep firmly in mind the fact that regions are political constructs anyway. Take the EU for example: who would have thought that Turkey would be seriously considered in the construction of a united Europe? Certainly not on any cultural, economic or even geographical logic. And yet there we are, with Europe’s frontiers expanding to include countries that, when the European Coal and Steel Community was established in 1950, would not have been considered potential candidates of the new Europe, by any stretch of the imagination. If Europe can think of itself as a supranational entity, despite the many diversities it embodies, there is no reason why the Mediterranean should not – assuming it wanted to. Seen historically, this Mediterranean gaze is nothing more than another faltering step in our effort to widen our associative communities from family to clan, from clan to nation, and from nation to region and to more all-embracing notions of global citizenship.

In some ways, then, what we are doing here is taking up the words that Kazamias uttered when he was converted to the notion that this form of comparative education was not an apostasy as much as a different way of doing ‘science’. ‘So what’, quizzed Andreas, ‘if the Gods are false, if good things are done in their name?!’ (Kazamias, 2001, p. xii). Similarly supportive was an anonymous reviewer of a paper I submitted to US comparative education journal, who suggested that what we were doing was promising not only for our region, but for other areas in the world which had a sea in ‘Medi-terra’ – in the middle of lands – such as the Caribbean, for instance. Robert Cowen, a UK comparativist based at the Institute of Education in London, picked up on this theme when he commented very positively on our efforts at a European Society of Comparative Education (CESE) conference, noting the promise in focusing on what he referred to as ‘permealogies’ and ‘immunologies’ in the ‘rims’ and ‘peripheries’ of this world (Cowen, 1998). Such international support is comforting. But nothing beats the thrill of seeing colleagues from around the

region become excited by this venture, and nothing underscores the value of the project more than its ability to generate new insights into understanding and promoting sound educational practice in our region. This, I would submit, is a key agenda for us all, and for a robust future for comparative education with a Mediterranean dimension.

The many heads of the neo/post-colonial Hydra

Epistemological hurdles were the least of our worries as we set about giving shape to our Mediterranean comparative education project. Much more pressing were challenges that I will group under the term ‘neo/post-colonial’. This needs some unpacking, and a few examples will hopefully give a sense of what I am referring to here.

First, we have encountered substantial difficulties in getting south-south collaboration. Some of these difficulties arise out of the fact that our home universities rarely have the funds to facilitate research and research-related travel. Any such funds are generally made available by agencies and institutions based in the economic ‘North’, and they are often premised on notions of north-south transfer of knowledge, rather than on development models that acknowledge the value of south-south collaboration. But there is a further reason to this, one that belies post-colonial mentalities where we fail to value the indigenous knowledge and wisdom we have in our own region, preferring instead to work exclusively with universities and academics in metropole countries. There are, of course, several advantages in doing so – not least the pleasure of being taken seriously by the big shots in town. But the downside is equally obvious, in terms of choice of research themes, of theoretical frameworks to make sense of data, of the usefulness of such research for the communities in which we are embedded, and so on.

Post- and neo-colonial issues that have an impact on our efforts to develop a Mediterranean dimension to our work arise in other ways too. Much, for instance, has been written about the World Bank and its role in reinforcing dependency through its fundamentalist commitment to neo-liberalism as the master doctrine that guarantees development. I am convinced that such critiques are fair and just. What is even more worrying from the perspective of a critical comparativist is the fact that education in our region is increasingly being colonised by World Bank agendas, particularly now that Sector-Wide Approaches (SWAP) are commonplace. SWAPs may mean well in getting all education actors, including international aid and development agencies, around a table in order to ensure better co-ordination and more efficient use of funds. I have been around several

of these tables as an observer, and very often these are World Bank tables, in World Bank offices, chaired by World Bank staff. I have seen UN agencies, including UNICEF and UNESCO – whom traditionally I have looked up to for the occupation of the moral high ground – being drawn into the ideological terrain as defined by the World Bank.

Much of the goings-on at these SWAP meetings are motivated by good intentions, and also by a principled commitment to educational development. But it is worrying that underneath it all is an increasingly unquestioned slide into a utilitarian, one-dimensional view of education as defined and determined by the ‘North’, in terms of what should be prioritised, who and how should implement it, and what outcomes should be expected to determine success. Anything that does not measure up to this ‘referent’ is consequently defined in deficit terms, further reinforcing dependency.

It bears underling the point that the European Union’s activities are not outside this critique, despite the fact that the EU likes to present itself as enamoured of the so-called ‘social model’, which it contrasts to the presumably more vicious ‘market model’ of the US. While some of its interventions in the region are to be lauded – and I have in mind the recent establishment of the Anna Lindh Foundation for Dialogue between Cultures in Alexandria, Egypt – others are much less so.

Take the Euro-Mediterranean Partnership, for instance. The so-called Barcelona Process – which was launched in 1995 in order to establish a wide framework for political, economic and social relations between the member states of the EU and partners of the Southern Mediterranean – brazenly suggests that higher education institutions should be set up and developed in the MEDA region with EU member state support in order to safeguard EU economic interests, especially in relation to the goal of offsetting competition from the US. More recently, the EU borrowed a feather from the cap of the American Fulbright programme, establishing an *Erasmus Mundus* programme in order to ensure that the brightest and the best from developing countries in the world studied – and stayed on – in the EU rather than in the US. There seems to have been little concern here about the fact that what represents a brain gain for the EU in its efforts to reach the Lisbon objective ‘to become the most competitive and dynamic knowledge-based economy in the world by 2010’, in fact represents a brain drain from countries who can ill afford this luxury.

Our efforts to develop a Mediterranean dimension in our comparative work would therefore, in my view, require us to recognise what some of the drivers behind development aid are, and to establish our own agendas in ways that are more responsive to our needs, and which benefit our priorities. Mediterranean comparative education should also be recognisable by its active search for

alternative forms of educational practice, ones that contest the reductionist vision of schooling in terms of skills and competences that drives so much of what passes as education in the world today.

The lure of ‘dislocated provincialism’

The development of a Mediterranean dimension in comparative education has a third challenge to face, one that I am here referring to as ‘dislocated provincialism’ – an oxymoron, of course, but one which serves to vehicle what I wish to say. By its very nature, comparative education requires scholars to rise above the particular and to consider this in relation to broader principles, as well as in relation to broader geographic and epistemological vistas. Indeed, one of the benefits that is usually attributed to comparative education is that it provides a body of descriptive and explanatory data which allows us to see various practices and procedures in a very wide context that helps to throw light upon them. Now, a lot of what passes as educational scholarship in our region tends to be precisely the opposite. I am here reflecting in particular on the literally scores of submissions that reach the editorial board of the MJES, and that we have to reject. Needless to say, there are many good, even excellent pieces that we receive and publish, and that also appear in other, often more prominent journals internationally. On the basis of what reaches us, and in the light of conversations I have had with Arab, Turkish and other scholars from Mediterranean countries whose languages I do not speak, and who could comment on papers that appear in their own country’s journals, I have drawn a number of conclusions which, if correct, signal a serious obstacle to the development of comparative education in our region.

I am here referring to the fact that many papers in education are narrow and provincial in scope. They typically focus on a very specific issue, and restrict their purview to a very limited and particular context – such as ‘Student attitudes towards assessment in Grade 12 in a state school in Jordan’, for instance, or ‘The use of portfolios in initial teacher training at the University of St Joseph in Beirut’. My problem with these kinds of papers is not the narrow focus in and of itself: after all, as Leopold Sedar Senghor once pointed out, by living the particular to the full we reach the dawn of the universal. It is rather that such studies remain narrowly provincial, failing to place this specific context in a broader national or regional one, or to analyse how national, political, cultural or economic dynamics have an impact on the phenomena that are being described. Hence the term ‘dislocated provincialism’ that I am using here. At the end of the day, one is forgiven for concluding that what is being described could very well have taken place in

Australia or the Azores, as no contextual clues are given, nor is there an insight into how specificity of place shapes educational phenomena and practices in particular ways.

Such lack of embeddedness appears in other ways too. Literature reviews draw almost exclusively on what is reported in other – generally western and high income countries – and the assumption is made that what was discovered in those countries applies unproblematically to the author's own. It is not surprising, therefore, that theoretical and explanatory frameworks, when they appear, are almost without exception also drawn from metropole countries, with little attempt to acknowledge the specificities of country and region – such as, for instance, the preponderance of informal labour markets and the impact this has on motivation to engage with formal learning; the negative returns to schooling; the importance of '*wasta*' and family influence in getting employment; the particular relationship between religious elites and leaders in the state apparatus, and how this impacts on education in such areas as curriculum development; or the way private tutoring reproduces élites. Insensitivity to contexts is also often evident when it comes to making recommendations about ways forward, such as when teacher development models are unproblematically borrowed from the UK or the US or France, with little if any attention given to the fact that most teachers in our region are underpaid, and have to hold down a second and third job after school hours in order to make ends meet. In such conditions, teachers have little desire or motivation to invest spare capacities in improving their teaching through the new-fangled approaches promoted by the North, such as school development planning, curriculum development in teams, and after-school preparatory sessions, which might work well in other contexts were teachers do little else but teach.

The methodological tools that are employed also tend to be narrowly quantitative in scope, with papers typically rehearsing the tired mantra that starts off with 'purpose of the study', followed by a 'definition of the problem' and a 'definition of terms', moving on to a description of the methodology, with subsections on sampling, and the choice of instruments used to measure the phenomena in question. When we come to the substance of the paper, what we get is a 'discussion of results' section which generally includes the presentation of several, often impeccably designed statistical tables. However, in far too many instances, the reaction of reviewers to such attempts are that the mountain has laboured only to give birth to a mouse ... or, to quote the advice given by an exasperated and perhaps somewhat cheeky referee: 'What is not worth measuring is not worth measuring well'.

There are, of course, many possible reasons for these shortcomings – though we need to be careful and nuanced in our approach to avoid the temptation of

unproblematically adopting the referents and measuring sticks of metropole universities. Certainly, the almost total dependence of academics on the state for their livelihood renders them vulnerable – as the Finland-based Moroccan sociologist Sabour (2001) states in his discussion of academics in the Arab world, it is a bit like sending out the matador to face the bull without his muleta. The limited intellectual freedom in some of the region's universities, together with not unfounded fears of reprisals, can act as a powerful deterrent to sociologically imaginative and politically engaged research that speaks to context in very specific ways. The fact remains, however, that comparative education in our region can only thrive if, to sustain the image, we do take the bull by the horns and develop a community of inquiry where we support each others' efforts to engage the world as it is, to imagine a world as it could and should be.

In conclusion

In conclusion, what I have attempted to do in this chapter is to reflect on my personal and professional journey in developing a Mediterranean dimension in comparative education. I have highlighted the way that such a journey has opened the road for cultural dialogue for me, a dialogue that has both intra-personal and inter-personal dimensions leading to self-discovery, and to the discovery of the 'other' in this 'self', as all Odyssean educational endeavours tend to do. I have also highlighted the practical steps that we have put into place at the University of Malta in an effort to take on what, for many, is a quixotic and idealistic desire to connect educational researchers in this diverse, often divided region of ours. Finally, I have pointed out to three main obstacles that we still need to overcome if we are to make headway in the future, namely: (i) the lack of confidence in the legitimacy of our project; (ii) the neo-liberal and neo-colonial influence on the definition of what counts as education; and (iii) the dislocated provincialism that pervades much of our educational scholarship. In all three cases, the antidote seems to me to be the same: the development of a community of scholars that collaborates across south-south and south-north axes in order to develop the confidence, strength and drive to make a positive difference to education in our region. It is my hope that future activities and associational endeavours such as the one represented by the Mediterranean Society of Comparative Education, take us one step further in this direction by providing us with an eminent opportunity for dialogical co-investigation.

Notes

1. Thanks are due to Linda Herrera for her careful reading of the text, and for her constructive criticism. I am also indebted to André Mazawi for his astute and insightful feedback on various aspects of our Mediterranean initiatives, which helped me better appreciate our efforts in relation to the wider context of comparative education.
2. The first to refer to Malta as a 'bulwark' – in recognition of its having successfully halted the advance on the Ottomans on Europe – was the German scholar Hieronymus Megiser in 1606 (see Friggieri & Freller, 1998).
3. Frontex, which is based in Warsaw (Poland), is the EU agency for external border security. It is responsible for co-ordinating the activities of the national border guards to ensure the 'security' of the EU's borders with non-member states.
4. The term 'Schengen Agreement' refers to two agreements concluded among European states in 1985 and 1990 that deal with the abolition of systematic border controls among the participating countries.

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CHAPTER 2

Knowledge and Post-colonial Pedagogy

JOSANN CUTAJAR

This chapter departs from the premise that knowledge is a source of power, and that we need to come up with pedagogical and academic tools to ensure that disparately positioned individuals/groups within society can voice their experiences and are heard. Academic institutions found in small, intermediately developed countries such as the Maltese Islands tend to be dependent on Western derived epistemologies and enunciative tools to carry out representation and re-definition exercises. Such exercises are necessary for disenfranchised groups/nations to theorise the past from the location of the present in order to map out the future. A number of issues have to be taken into consideration when such an exercise takes place. The primary objective is to provide the subaltern with agency, agency based on transversal dialogue between disparately positioned groups within academia and the public sphere both within and without particular nation states. Such a dialogue would be facilitated if a post-colonial pedagogy is adopted. This pedagogy would help challenge neo-colonial discourses and practices which have infiltrated academia with the hope that these exercises are adopted in other spheres of life, and hence more egalitarian societies created.

Introduction

In this chapter, the author explores how the location and positionality of the producer/disseminator of knowledge impacts on the valence and credibility of the knowledge produced, and how this in turn is implicated in agency. Academics are not only embodied and classed, their ethnicity/race, generation, sexuality, politics, nationalism, and religion interact and intersect with the knowledge they consume, produce and disseminate. This chapter explores the discourses and practices that are negotiated in the creation and dissemination of knowledge, and the consequent material and political ramifications implicated in each decision made. The articulation, production, consumption and dissemination of knowledge are affected by the context and audience/s implicated at particular moments in time. The context that is going to be studied in this chapter concerns knowledge produced by Maltese academics situated within the University of Malta and knowledge disseminated within this context, although it might be produced by and for others beyond this space.

Epistemological indebtedness

Analytically, the conclusions reached in this chapter are very much indebted to feminist theories, especially Black and Third World post-colonial theories. These approaches theorise the particularity of political and scholarly opinion and provide the analytical and pedagogical tools needed to delineate how specific historical, personal, embodied and geographical locations and positions, produce particular knowledge/s discourses, with the consequent material and hence political effects.

Black, Third World and feminist post-colonial theories emerged when exponents within the feminist approach started critiquing the universal claims made by white feminists, claims which did not explain the structural locations of Black, Third World and post-colonial women (Abbott, Wallace & Tyler, 2005). Post-colonial feminist theorists charged white feminism with ethnocentrism, theoretical racism, cultural appropriation and the perpetuation of a victim ideology for non-white and colonised women. Another critique was addressed at male stream renditions of post-colonial theories. Researchers such as McClintock (1995), Grewal (1996) and Brah (1996), among others, delineate in intricate detail the fact that colonial and post-colonial subjectivities are gendered. In male stream post-colonial studies, the feminine stood for the deprived, pre-colonial, emotional, and traditional (e.g., Said, 1978).

The Black and feminist post-colonial critique was seminal, according to Lewis & Mills (2003), in the development of critical studies focusing on colonialism, imperialism, race and power. Once the legitimacy of post-colonial and anti-racist studies was confirmed in established circles, however, the contribution made by feminists was either overlooked, or marginalised. Lewis & Mills (2003) insist that once post-colonial and anti-racist knowledge entered the 'hallowed' circles of academia, the material analysis of class, gender and sexuality, among others, was subsumed under post-colonial rationale in certain disciplines.

Apart from underlining the importance of recognising that gender relations are racialised, Black and feminist post-colonial exponents were critical in the dissemination of certain analytical tools which still prove useful when it comes to conducting research and disseminating knowledge. These include the issue of collaboration between researcher and participants in a study. Hastrup (1992) and Hondagneu-Sotelo (1996) maintain that whether participants are from the same culture or not, they need to be consulted and worked with, so that the political agenda for action stems from the collaboration of all parties concerned. Hondagneu-Sotelo (1996) believes that an ethics of reciprocity might help mitigate a colonialist way of doing research. The insistence among a number of post-colonial feminists is that research should be undertaken with and for the benefit of the participants, whether the change sought consists of raising

consciousness within the participants themselves, and/or the authorities concerned.

The main objectivity of conducting research with, for, by and from is also helpful when it comes to demonstrate that 'native' women or members of oppressed groups are not just victims of discrimination or oppression. Such studies will help uncover the fact that the so called 'subaltern' has agency, albeit within limited parameters at times. The objective of feminist theory nowadays is to give voice to oppressed groups/individuals by conducting research for, by and with members of subjugated groups. As Spivak (1993) however maintains, not all oppressed groups question or oppose imperial and colonising discourses of power. Some, as in the case of Maltese political, bureaucratic and business elites in pre-colonial and post-colonial eras, might collaborate with colonial elites, internalise and promote dominant discourses to serve both their and the 'master's' purposes (see Sultana & Baldacchino, 1994).

Other Black, Third World and post-colonial feminists voice their concerns about projects concerned with the recuperation of 'alternative' experiences and hence knowledges. Chow (2003) is afraid that such projects might help relegate 'native' as the Other. In this case, epistemic violence is carried out when the native comes to be perceived outside the normative subject of Western modernity. This issue crops up during so called 'international' conferences when researchers from developing or non-Western countries are chosen as token representatives of Other women (Min-ha, 1989), or collectively relegated to sessions held at awkward times, which are then poorly attended.

These issues are related to the 'politics of location', an analytical concept Adrienne Rich (2003) explores in her own work. Rich, in her critique of the Marxist universalisation of the masculine experience as disembodied/androgynous, maintains that women's experiences and their knowledge are perceived as subjective. Rich insists that all knowledge is situated, and therefore partial. Although male researchers and 'white' feminists tended to adopt the stance where the claims they made were perceived as universal, hence relegating knowledge deriving from other sources as secondary since it was deemed to be 'situated'. Rich however recognises that due to the relationality of identity formation, all knowledge is situated, whatever claims made otherwise. Another issue explored by Rich concerns the difficulties dealing with enunciation, issues which will be explored in more detail in the rest of the chapter.

Black feminists, such as Patricia Hill Collins (1991), have come up with other useful analytical tools. Hill Collins, for example, was very influential when it came to delineate how gender is implicated in a matrix of power, resistance and exploitation. In her book *Black Feminist Thought* she demonstrates how one can study the interlocking oppressions of gender, race and class among others at the

individual, group and structural levels. Hill Collins, due to her own locatedness, neglects to explore the effect of the global on the local. This issue is in turn taken up among others by Brah (1996) and Pettman (1996) who delineate how late capitalism's global reach impacts on gender. In their work on immigrant women, they explore how sexual subjects are positioned by global capital.

Feminist post-colonial theories derive from the recognition that the generic term 'women' does not exist. Women derive from different cultures and social backgrounds, and hence tend to have different interests and concerns. This concern for equality and respect for diversity has inspired feminist educators to devise a pedagogical approach which strives for egalitarian relationships within the educational institution. As Briskin & Coulter (1992) sustain, feminism 'recognizes education both as a site for struggle and as a tool for change making' (p. 249). This project is based on the need to make all students and their experiences feel valued. These principles are crucial in a pedagogical stance where the experience of students is going to be used as a learning resource (Weiler, 1991). Curtis (1998, p. 138) believes that the 'inclusion of our historical and social locations as they relate to power, oppression and privilege has the potential to be a compelling component in the construction of curriculum' as well as knowledge. Feminist education for hooks (1989)

'is and should be a place where there is a sense of struggle, where there is visible acknowledgement of the union of theory and practice, where we work together as teachers and students to overcome the estrangement and alienation that have become so much the norm in the contemporary university.' (p. 51)

The following section will explore the implications surrounding recuperative projects undertaken by subaltern subjects. This project incorporates the need to historicise and theorise the position of the present in order to map action for the future. The epistemological and pedagogical tools produced by feminist post-colonial exponents are still useful, even when gender is not always the most salient rallying point to bring about change.

The production of knowledge and post-colonialism

Due to the Maltese Islands' liminal location within the global economic world order, Maltese sociologists are still dependent on the West for the production and dissemination of knowledge. Since the Maltese Islands are, according to Briguglio (1988; cited in Tabone, 1994, p. 171), an 'intermediately developed country', this positions Malta within the liminal zone between First and Third World, East and

West. This factor is becoming more evident in the research that is being conducted on a European level, research that is being used to locate the socio-economically differentiated social groups within the different member states within the ever expanding entity of the European Union (see Government of Malta & European Commission for Employment and Social Affairs, 2001; Government of Malta & European Commission, Directorate General for Employment and Social Affairs, 2003).

A country's socio-economic stand in the global state of affairs has an effect on the creation and production of knowledge. As Burgelman & Pauwels (1992) point out, small European countries have limited media production capacity. This might derive from the limited domestic market and/or technology available. Demographic constraints, together with a limited linguistic reach, limit the profit making potential. When the language is not shared by others, it is more difficult to export national media products and find an alternative market.

At the same time, the fact that the Maltese Islands were a British colony for almost two centuries prior to 1964, might perhaps explain why we still look to Western countries, especially English speaking ones, to help us in our political and cultural self-definition. Frendo (1988, p. 210) maintains that with the departure of the British in 1964, the Maltese politicians and bureaucrats did not try to break their links with the past, but adopted and appropriated the political, social, cultural and economic structures and discourses reinstated in the Maltese Islands by the British (see also Sultana & Baldacchino, 1994). The Maltese academics did the same. We have now transferred allegiance to the European Union, and this entity is now having a concomitant effect on the practices and objects we appropriate and use.

Such a dependence on forms of knowledge and/or texts produced in other contexts will of course have an impact on self-identity, at the individual, local or national level. Malta's location within the political economic context together with its relatively small size might explain why Malta cannot afford to produce and reproduce its own forms of knowledge/s. Philip Altbach (1971) maintains that this dependence on First World publishing and critical facilities derives from the hold these have on the production and dissemination of knowledge on a global basis.

At the same time, the Maltese Islands' location within the world order affects the cultural currency Maltese forms of knowledge have within this global market. Ghosh (1998) points out that authors deriving from economic and political contexts other than the First World are consumed as subalterns by reading publics within both the First and Third Worlds. The irony is that knowledge produced and/or disseminated by First World academic and publishing institutions is perceived as being universally applicable. In reality all knowledge is the product of a

differentially positioned individual/s trying to make sense of a phenomenon in a particular time and space. When First World knowledge production and dissemination market imparts 'literary' value, knowledge produced/disseminated in other sites runs the danger of being seen as reflections of other, localised worlds (Ghosh, 1998).

Ali Mazrui (1995) points out that this history of dependency is also tied with colonial systems of education. In his study of colonial education in Africa, Mazrui concluded that this dependency on Western knowledge derives from a number of factors, including the language of instruction utilised, the source and extent of library holdings, the cultural background of faculty members, the curricula structure, as well as pedagogic requirements. These issues also concern the Maltese university, which like the African universities studied by Mazrui, perceives itself as an extension of major European universities. At the University of Malta, English and the Maltese language are purportedly given equivalent valence as pedagogical languages. In reality English is the main pedagogical language since economic necessity and political links have led to a growing influx of non-Maltese students. Faculty members and students have no option but to converse in English since this *lingua franca* enables individuals from different nationalities to bridge cultural differences. With regard to library holdings, the majority of texts derive from First World, English speaking countries. Knowledge deriving from less economically developed countries is harder to come by, and might be linked with particular courses such as post-colonial literature and/or anthropology. This might be due to the fact that a considerable number of faculty members studied in First World countries due to historical ties with England or North America, and retain this link through the knowledge they consume, produce and disseminate. Exposure to First World academic practices and knowledge is also manifest in the curriculum content and structures adopted. With regard to pedagogic requirements, students are required to prove their competence in English rather than the subject/s in which they might be specialising when test papers are set in English.

Mazrui (1995) retains that in such a system, the cultural self is at stake. The Maltese Islands, like a number of other ex-colonies have adopted the West as their 'primary referent point' (Mohanty, 1997, p. 258). As Said (1994) would put it, the Maltese as a nation are still dependent on 'an authority based elsewhere' (p. 223). But while we might be looking to the North to see which goals we still need to attain, we are simultaneously comparing ourselves with the South and East to measure our progress. This comparison of the self with the First World and the rest takes place on a daily basis in our classrooms since a growing portion of our students derive from countries other than Malta. Interestingly enough, the presence of students from European, African, and Asian countries facilitate

constant interaction within and outside the classroom which leads to the discussion of the same issue from the different socio-political and cultural locations. The presence of students from North American countries though sometimes tends to stifle this healthy sharing of ideas. This of course depends on the individuals involved. People positioned in less powerful national locations might look up to nationals deriving from a country perceived as a cultural and political paragon. Marginalised individuals and nations tend to be conversant with the cultures of both the dominant and subordinate social groups, and their voice might be silenced when confronted with the judgmental gaze of the dominant social group. Chinese students at the University of Malta are silenced in the presence of the majority group – the Maltese.

Access to knowledge

One should also add that there is a gender, class, sexuality, disability as well as an ethnic disparity when it comes to accessing the limited means of knowledge production and reproduction available within the Maltese nation. With regard to the formal and informal means of cultural production and dissemination (television, radio, print, organisations), the majority of these entities are found in Malta, the larger island. These organisations are financed mainly by the state, the two main Maltese political parties, the Roman Catholic Church and/or private capital (see Cutajar, 2004). These organisations tend to promote the experiences and world views of the majority group, namely middle class, middle aged, Maltese, heterosexual and mainly Roman Catholic men. Marx & Engels (1976; cited by Stabile, 1997, p. 399) sustain that the class as well as the country with the means of material and mental production at its disposal, has the power to subordinate those who lack the means of mental and material production.

When certain social groups within the Maltese Islands are negated access to these organisations, their views and/or experiences are rarely incorporated within texts produced locally (Cutajar, 1998, p. 9) or abroad. The symbolic annihilation of certain social groups within texts is often blamed on their subordinate location within the political and socio-economic context. At the same time, their symbolic annihilation within the means of knowledge production is used to legitimise their unequal access to the material and political resources found within the same context (Jakubowicz, 1994).

As marginalised subjects within the national and/or the global context, both Maltese and the myriad Maltese social groups tend to depend heavily on epistemologies, discourses and research methods deriving from the West to make sense of who they are within the local, national and global contexts. There

is always the fear that these acts of self-explanation, might lead to the essentialisation and homogenisation of social differences. Luckily, knowledge and skills acquired can be argued, contested and understood differently in a context where the student population derives from varied imagined communities. Ghosh (1998) maintains that these transversal exchanges of cultural experiences need to be accompanied by theoretical discourses that are self-reflexive about their own cultural and epistemological dependencies.

Is there a Maltese sociology?

Western theories, epistemologies and methodologies provide Maltese researchers with the tools that enable them to study and analyse their location within Maltese and global society. Our colonial inheritance makes us dependent on analytical tools and concepts fashioned elsewhere. Maltese academics on the whole perceive their own experiences/knowledge as being situated, and hence partial. They are therefore hesitant about coming up with theories and methods to explain certain issues whether they are pertinent to Maltese context or not. Some of these issues cannot always be analysed through the use of appropriated tools.

As a nation subordinate to authorities based without the nation, Maltese researchers attempt to justify claims they make by referring to a number of sociologists who have achieved prestige in the First World. Maltese students and/or students taught at this site, become conversant with theories of the sociological masters, learn how to emulate them and sometimes stop there. Examiners criticise sociology students for not critically discussing social issues or evaluating theories sociologically (Chairperson, Board of Examiners, 2002, p. 1). A number of Maltese sociologists can be accused of adopting this stand as well. As Maltese academics we might not realise that some of the theories we use in our work – like, for example, those that explain and explicate social class in Britain – do not describe what is really happening within the local context. As Baldacchino (1993) points out, the Maltese social stratification system is so different from that of Western countries, that the appropriation of ‘ready-made’ stratification models would be like trying to fit a square peg in a round hole.

Changes in the Maltese sociological perspective

Early Maltese sociologists tended to assume that the Maltese population was quite homogenous and rarely bothered about studying the effect intersecting forms of marginality can have on perception and action. In the past, the focus tended to

be mainly on the effect social class had on life chances and subjective location. The majority of research projects used to take 'man' as the basic unit of social analysis, and generalised their findings to the rest of the population to emulate their 'masters' abroad. Research on women, especially women from socially excluded areas of Malta, was rare apart from Sybil Mizzi O'Reilly's (1981) seminal work on women in Senglea.

This picture is changing nowadays. Gender, social class, disability, sexuality, regional derivation and age are social factors which are being studied on their own or in conjunction with other forms of marginality. Researchers such as Abela (2002), Vassallo, Sciriha & Miljanic Brinkworth (2002), Cutajar (2000) together with Arrigo & Formosa (2007) are focusing on the interaction and intersectionality of social factors on people's experiences, actions and life chances.

There is also a growing realisation that the country's location within the global economy impacts differently on groups and individuals at the local level. As inhabitants of a small country, we have always felt our precarious, tenacious hold within the global state of affairs. Researchers within the Maltese sociological context are realising that individuals/institutions are dealing with supra-national and state structures, discourses and personnel at the micro-level, with factors in their identity implicated in the day to day interactions and transactions with these entities. These discourses and practices position individuals differently at different moments in time, and these have an effect on the agency of those concerned. The country's, group's and individual's positionality and location within the world order impact on the subjectivity and hence the agency of the entities/individuals concerned.

Writing the text

Maltese researchers have internalised a colonial mentality. In our mind we write a text with the premise that we are addressing a First World audience even when speaking about and to a Maltese audience. As sociologists we have internalised the colonial scope: we write in English, use First World concepts, methodologies and epistemologies and are constantly aware of how our work might be received outside Maltese shores. Some subalterns fail to engage seriously with urgent issues pertinent to the societies in which they are located since their primary objective might be to gain entry into Western academe. Their fear is that by focusing on local issues, the knowledge produced might be ghettoised at the international level.

In fact we seem to be attempting to please two academic canons concurrently – the informal/formal tenets imposed at the local and international level. With too

many audiences in mind, we might be losing sight of the fact that we are also responsible toward those we chose to work with and speak about. It is high time that we start adopting 'an ethic or reciprocity' when conducting research with human participants. Hondagneu-Sotelo (1996, p. 109) promotes an ethic of reciprocity because this helps to mitigate a colonialist way of doing research. This ethic of reciprocity is based on the need for researchers to compensate the participants involved in their research project for the time, effort and energy expiated during fieldwork. Reciprocity does not occur when the researcher appropriates the knowledge garnered during the fieldwork to promote her/his own career on the backs of others, but uses this knowledge to bring about change. The objective is to ensure that the knowledge created and the process through which it was created serves to act as sites of resistance.

As can be seen, Maltese researchers/students are placed at an 'intersection of a system of differences' (Abu-Lughod, 1991, p. 140). Abu-Lughod maintains that this dialectical space emanates from the inherent contradictions within enunciative positionalities – namely our liminal position within the global order and how they interact and intersect with our positions within the local social milieu. This position however can be utilised to explore the interplay between repression and resistance (Kaplan, 1994, p. 143). By exploring the interaction and impact of interlocking oppressions, we are eventually helping in creating new research methods and theories based on situated experiences. This happened in the case of Patricia Hill Collins (1991) who through her exploration of her location as a Black woman in American academia, came up with an Afrocentric Feminist epistemology.

Resistance, according to Pratt (1992, p. 7), can also take place when idioms appropriated from the coloniser are utilised to make sense of the colonised. The appropriated icons, objects and symbols used to make sense of another context, according to Hueng (1995, p. 86), are transformed in the process of analysing another context and consequently infused with different meanings resulting in semantic reversals.

Greenman (1996, p. 50) adds that when the researcher uses Western textualised norms and concepts to explore issues pertinent to a particular context, this also helps to deconstruct Eurocentric perceptions of the Otherised nation, group or individual. Such texts help disrupt the still prevalent images that individuals in developing nations are passive, subservient or lacking in creativity (Behar, 1993, p. 272). As a consequence, these sociological tracts help to challenge Western interpretations of resistance and agency.

As a nation we need to conduct more research to understand ourselves, what our needs are and how we go about addressing them. To understand ourselves we need to explain 'us' to ourselves first, perhaps in our own language, through the

use of home-grown or adapted theories, methods and other analytical tools. This does not mean that English and European texts written or translated into English cannot be used, and some knowledge appropriated to facilitate this process. Ghosh (1998) maintains that post-colonial resistance occurs when equal importance is given to vernacular and supplemental knowledges as well as academic canon.

Ghosh (1998) insists that grass roots knowledge will be lost unless the post-colonial critic takes on the task of research and translation as everyday pedagogic practice. This act of translation has political and economic ramifications since it will help determine the 'literary' worth and 'marketability' of particular, situated knowledges. Such research is more likely to be conducted by scholars/students who have had been exposed to critical and/or post-colonial pedagogy.

What we might not be doing is relaying the results back to the population that assisted the researcher. This happens when the results are published in First World journals and/or in a language that is not comprehensible to those who participated in the research. The dissemination of such knowledge within their context in a language comprehensible to marginalised groups helps empower them. Non-First World researchers tend to promulgate the power and privilege of the English language when they opt to write in this medium, and hence restrict access to knowledge produced collaboratively in the field, knowledge garnered through a language and/or terminology with which the participants are conversant. Ghosh (1998) retains that this tends to happen since academic discourse has a tendency to be inward looking, with the potential of adopting a neo-colonial stance.

Advocacy or appropriation?

Maynard (1996, p. 20) differentiates between advocacy and appropriation. Advocacy occurs when the author puts forward and publicises the experiences of others and hence provides the silenced with the means to speak. Appropriation occurs when the information given by common individuals is reworked and redefined by the author, which results in the elision of the providers of this knowledge.

We have as yet not tried to find a way that will enable sociologists to speak without infringing on the Other's right to speak in their own terms. We are sometimes more concerned with demonstrating our competence in sociological lore than in paying attention to the participants' personal, private voices and knowledge/s. There are instances, though, where researchers such as Gatt & Mula together with other contributors in *Inside/Outside Schools* (Sultana, 1997) experimented with ways of giving voice to the participants and not only providing the translated and re-worked rendition of what they say.

Replication and/or resistance

Women of Colour and Third World Feminist scholars have different attitudes toward the appropriation of Western/First World epistemologies and enunciative codes used to speak about 'ourselves'. Some, like John (1989, p. 72), believe that by using Western epistemologies and enunciative codes, non-First World scholars are helping in the replication and consolidation of the language of power and privilege. For John, enunciation bound with the hegemony of English just helps to add to the depth of intellectual development within this location and not challenge it.

Others (see Wolf, 1996) believe that by adopting and adapting these enunciative tools, scholars deriving from developing countries can learn about their communities of derivation while simultaneously teaching First World audiences about themselves. While using these appropriated tools, scholars deriving from developing countries can help simultaneously to deconstruct Eurocentric and androcentric sociological concepts of themselves (Greenman, 1996). This happens when the idioms appropriated from the coloniser are transformed in the process of depiction, according to Pratt (1992). Semantic reversals take place when concepts utilised to describe First World entities are endowed with a different meaning when they are used to describe other contexts.

Language

The linguistic medium used by the groups and/or individual Maltese researchers interact with in their field of research and teaching is not always English. English is however used to relay the ideas and concerns expressed by the 'subjects'. This is also the working language our students have to utilise when it comes to reading, discussing and writing about sociological issues.

The fact that the language used within the research field is different from the language used in the text creates a number of problems for researchers/students. The immediacy of the narratives, as well as the idiosyncrasies of speech, is lost in the process of translation. At the same time, translating one phrase in Maltese often involves a lengthy explanation in English since the cultural connotations also have to be elucidated upon. This explanation never really captures the multiple interpretations of the phrase in question. McBeth & Horne (1996, p. 74) argue that in the act of making these experiences public outside the culture in which the respondents are steeped, means that the nuances of a word, phrase or cultural symbol are lost in the process of translation.

English is also the main pedagogical medium used at the University of Malta, in spite of the fact that teachers can use English in conjunction with Maltese to teach. When teaching sociology, we are not only expounding sociological concepts, we also have to explain to our students the socio-cultural and political milieu in which a particular sociologist was implicated, and the factors within his/her life or society that facilitated a particular line of thought. So as teachers we are translating on three levels – on a linguistic, cultural and/or sociological level. This entails time, a scarce resource when a number of issues have to be covered. Students however need to be taught how to be self-reflexive where sociological discourse is concerned, or we might be running the risk of promoting global hegemonies.

At the same time one must take into consideration the fact that sociological tracts and examination questions are set and have to be answered in English. This means that students who are not well versed in this language are affected negatively. One needs to point out that students who do badly in these examinations might be quite fluent in verbalising their own understanding of sociological concepts in their own language. Expressing their ideas in written English is however another matter. Those who are not so conversant with the written form of English end up being examined on their level of competency of this medium and not on their grasp of the sociological content. In the end, those who are competent in English tend to pass, those who are not fail or barely pass. In this way, we are helping to replicate the Maltese social stratification system since, according to Sciriha (1994), English is often used to demarcate between Maltese social classes.

Neo-colonialism

Certain researchers such as Abu-Lughod (1991) believe that ‘halfies’ – in this case neo-colonial scholars whose cultural identity has been shaped by their exposure to knowledge produced, published and disseminated ‘overseas’ – are caught at the ‘intersection of a system of differences’ (p. 140). Du Cille (1994) maintains that the subaltern is often the product of a ‘white’ Eurocentric educational system that trains them as ‘white’ scholars. Malta’s dependence on imported texts and concepts means that the Maltese are the product of an overseas education conducted at ‘home’.

For Abu-Lughod and others such as bell hooks, it is this split in the Self that helps to generate an awareness of one’s positionality within the structures in which one is implicated. ‘Otherised’ scholars are conscious that their dependence on Western enunciative codes and epistemologies is a form of neo-colonialism. hooks

(1991; cited in Kaplan, 1994, p. 143) believes that ‘halfies’ should utilise this dialectical space emanating from the inherent contradictions within enunciative positionalities to explore the interplay between repression and resistance. But as John (1989, p. 68) points out, competency in the colonising class’s cultural code does not endow the subaltern with the same power to speak about themselves or their own community as the power which is inveigled in the dominant group.

Location of the researcher and the text

Said (1994, p. 245) is afraid that when intellectuals from colonial countries set themselves the revisionist task of explaining themselves to themselves, they are helping in the colonisation of the people they think they are speaking from and for. This happens when the colonised subjects undertake to represent themselves through the cultural frameworks they share with their coloniser, and thus they end up by representing themselves in ways that engage with the coloniser’s own terms, according to Pratt (1992, p. 7). When this act of self-definition is performed within this otherising context, it only helps to titillate the curiosity of a ‘white’ audience according to Fusco (1994, p. 143). This fear limits the efficacy of this act of resistance.

The location of the speaker also has an impact on the status of the text. As Carr (1994, p. 158) points out, the location of the author, more than the quality of scholarship is often assessed within academic circles. Thus as Pesquera (in Scott & Shah, 1996; cited in Wolf, 1996, p. 27) underlines, ‘Otherised’ researchers are caught between the dilemma of finding empowering methodologies with which to study the Other (themselves), while at the same time struggling to empower themselves in a global academic network that renders them powerless and invisible.

Interventionist pedagogy

Ghosh (1998) regards post-colonial pedagogy as the means of interrupting these ‘circuits of control’ at the level of the classroom, with the hope that these transitory, contingent and fragmented tactical interventions help undermine the historical distributions of economic and cultural power.

For Ghosh, the objective of post-colonial pedagogy is to problematise the politics of the academy, pedagogy, and the publishing industry, as well as the relationship of academia to international public spheres. Other issues that need to be questioned concern the choice of texts made at academic level. One needs to

ask who makes these choices, on which criteria, for which objective. Ghosh insists that such a pedagogical stance needs to be taken in order to situate texts, courses, requirements, as well as university policies within a larger understanding of transnational exchanges.

The demystification of texts, courses, requirements, and university policies will help to show them for what they are – a form of political praxis that helps promote certain forms of knowledge while suppressing others. This knowledge is made to appear as having universalising claims, when in reality it is as situated as other forms of knowledge. These claims however enable certain social groups to retain/attain power through cultural exchanges, while reifying the process in so doing.

Ghosh (1998) suggests that an interventionist post-colonial pedagogy is a praxis that helps position classroom knowledge and skills within the demands and constraints of transnational cultural economies. Such pedagogy stimulates students and academics to question on a continuous basis the conditions that enable them to study particular knowledge and not others, the practices they acquire and use. The objective of education, especially sociology, is to analyse structures, practices and content that we take for granted. By taking them apart and analysing them, and then constructively building them up collaboratively, we would be involving ourselves in a participatory exercise where decisions are made on a collective basis, taking the needs of the myriad individuals/groups into consideration. This needs to be an ongoing exercise if decisions and practices on what is taught, how, by whom and for which purposes is to mirror the interests of all those involved. Such exchanges facilitate participatory democracy, a much bandied around concept which few have put into practice, with the hope that this exercise might be adopted by those involved in other spheres in their lives.

As it is though, a neo-colonial stance has been adopted at the University of Malta. Influential agents within and without this institution dictate what needs to be learnt, through which mediums, by whom and with whose help. This coupled with the dependence on ideas and concepts created elsewhere to define and explain other social contexts, has rendered education an alienating experience to those involved. Knowledge is not being presented as something which explains and elucidates on one's experiences. It is seen by the majority of students, and perhaps by some academics, as a commodity which can be consumed, regurgitated without being analysed reflectively, and discarded when it does not accrue material or political benefits.

Ghosh maintains that an interventionist post-colonial pedagogy will enable students/researchers to understand the objects and practices of the classroom in terms of transnational epistemologies as well as transnational systems of production, consumption and distribution. When this happens, they might be able

to envision a transnational public sphere within which one can speak, write and act, with the purpose of bringing about awareness and agency, not the fear of ridicule or condescension. The primary allegiance of such self-reflexive agents should be toward their national public sphere Ghosh insists, because it is from this location that they came to perceive and explicate circuits that determine and are determined by their actions.

Mayo (2001) adds that learning situations created to enable participants to problematise Eurocentric knowledge should be accompanied by parallel learning situations where these same participants learn to valorise the different cultures of groups differentially placed within a given society. The valorisation of both difference and identity needs to take place concurrently. Mayo insists that the valorisation of subaltern cultures within a particular nation can only occur when marginalised groups are involved in curriculum shaping, the choosing of texts as well as pedagogical processes. For Mayo, democratic citizenship takes place when different cultures become part of the educational process. Unfortunately though, some Maltese researchers have not yet realised that difference – whether it derives from differences in sexuality, religion, political opinion, region, body shape, mental health or others – does result in a different culture, and not enough research has yet been carried out in the Maltese Islands on why some groups within the nation regard themselves and are regarded as different, and how this difference affects their life chances and hence their political agency.

It is high time that in the Maltese Islands we create ‘safe’ spaces where differentially placed groups or individuals can speak about their difference without the fear of their experience being censored, or ignored. Academia can set an example and provide students and academics alike with a space where people feel comfortable about expressing their divergent views and experiences, and while being willing to listen to others. Unless this happens, we cannot say that we have reached a post-colonial phase, but have denounced the imperialism of others, to fashion one of our own. Yuval-Davis (1997) calls democratic exchanges based on difference ‘transversal politics’.

Coalition building among those who perceive themselves as different needs to occur if this political forum needs to move on to the next phase – action. Transversal politics can occur because all of us have plural subjectivities maintains Grewal (1996). Individuals with multiple subjectivities have the capacity to form coalitions and links with other individuals/groups who are undergoing other forms of oppression since the experience of oppression on one/multiple levels, can enable the subject to understand the oppression of others on another level. Such identities, according to Grewal (1996), are enabling because they provide a mobility of solidarity across gender, class, race, nation, etc. and hence enable opposition in multiple locations.

Both Grewal (1996) and Yuval-Davis (1997) are however aware of the limitations of coalition politics. Grewal (1996), for example, points out that in coalition politics there is the fear that certain agendas might not be attended to. Kaplan (1994) delineates how this might take place. Her argument is that within the process of revision, particularistic difference is not equalised. This means that the position from where the individual speaks, will affect whether the voice is sanctioned, which affects whether in the end it is attended to. This means that the location from where you speak is crucial for effective political activism. Differential location entails differential political clout. The fact that every once in a while the agendas of those individuals/groups from the so defined margins get to be taken up, does not mean that pluralistic differences have been equalised. So the next step is to equalise difference.

Ghosh (1998) however holds high hope for the transformative prospects of post-colonial pedagogy. She believes that post-colonial pedagogy helps resist global circuits of control at the local level since it enables students/scholars to demystify texts and cultural spheres that shape political praxis. When this practice is adopted by a number of people in different countries, it might help reconceptualise the concept 'public sphere', and in the process help bring into fruition a form of global citizenship where a discursive consensus might be reached.

Conclusion

Knowledge is a site of contestation between different discursive regimes, a contradiction between anti-colonial and neo-colonial ideologies (Huggan, 1997; cited in Ghosh, 1998). The interventionist practices mentioned above are aimed at bringing about change at the individual, national and international level. Whether the debates which ensue in class and in certain academic circuits can bring about changes in mentality within the macro political, economic and cultural level is another matter.

Ghosh (1998) believes that the debates within these levels, while fragmentary, might eventually help reconceptualise transnational public spheres within which global citizenship is envisaged. The objective of this critical movement within academia aims at bringing about change in the world of expert knowledge, where method and pedagogy come to be envisaged as a form of public culture.

Coalition building between academics and people/groups outside academia, as well as among academics themselves, facilitates the sharing of knowledge among people who are differentially positioned. This sharing of knowledge between people differently positioned within the world order is beneficial on two counts.

Knowledge produced by different groups can be used to interrogate the power of privileged groups, an interrogation that might lead to the empowerment of another social group (Grewal, 1996). At the same time, coalition building among disempowered groups, whether they are academics or not, would provide the group in question with more political clout to bring about change on a national and international level.

Such an exchange can bear fruit if it departs from the premise that cultures are complementary, not different (Faulks, 1999). Faulks however adds that true participatory democracy can only work once inequality on a local and global level is eradicated. The dilemma is that this is what post-colonial pedagogy or transversal politics is trying to achieve.

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CHAPTER 3

Education and the Teaching of History in the Light of Encouraging Conflict Resolution in Cyprus¹

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This chapter focuses on the different interpretations of the history of Cyprus that have surfaced in recent years, and how the resultant literature has affected the way history had been taught in the North and South of the island. The study highlights two approaches. An earlier approach where in the long period of the geo-political transformation of Cyprus, education served the national, political and ideological division of the island and stressed ethnic differences, and images of the other as the enemy. This was followed by a later more contemporary phase, which has attempted to use the pedagogy of history as a tool to further reconciliation and understanding across the geographical and cultural divide of the Green Line. The chapter argues that these approaches, both at the level of the writing and the teaching of history, have been largely determined by the changing demands of both domestic and external interests. Thus educational usages and methodologies in the teaching of history often reflect in part, the changing parameters and praxis of international relations practice and theory.

The importance of a national memory

A country's history is a nation's soul. Indeed Hobsbawm (1992) tells us that, 'Nations without a past are contradictions in terms. That what makes a nation is the past, what justifies one nation against others is the past, and historians are the people who produce it' (p. 3). Kizilyurek (2001), writing on Cyprus, expresses similar sentiments, telling us that national memory is an unavoidable condition for the construction and embodiment of the national identity. The implication here being that the cult of historiography and the cult of nation are not separate, indeed the first is used to create the second, and legitimise the nation through the community of myths. For it is in these historical myths that we all too often find the past, the present and future of the nation (*Education for Peace*, 2004; Markides, 2005).

The history books on Cyprus, and to a greater extent its school textbooks, illustrate the truth of these statements. For a nation's textbooks are the vehicle *par excellence* to reflect and transmit the national memory, which is illustrated through this community of myths (*Disarming History*, 1999). Thus it comes as no

surprise that there is no such thing as a history textbook on Cyprus that details the exploits, the history, the national memory and corollary myths of a Cypriot nation (Kizilyurek, 2001)², for such a nation does not exist (Dodd, 1998; Peristianis, 1999). Indeed, if we were to use Hobsbawm's and Kizilyurek's statements as yard sticks to evaluate the state of Cyprus, then we would have to argue that Cyprus is as yet a state in the making, and that these important attributes of nationhood need to be created (Denktash, 1972; Calotychos, 1998).

Location and the reach of empire

Cypriot history books are numerous, for the island has been used as case material for studies on: conflict resolution, ethnicity, UN, EU, small states, islands, colonialism and empire building. Their quantity, illustrate more poignantly this vacuum, while detailing the story of Cyprus. They convey a historical reality of an island that has been constantly exposed to the vagaries of the international scene, and its history and social developments closely linked and largely dependent on external conditions. An island where external players were paramount in establishing the main contours of identity: cultural, linguistic and religious, the colonisers reinforcing their control, and extending their influence by tapping into the establishment, and attempting to reinvent this island's identity in their own image (Salem, 1992; Joseph, 1997; Dodd, 1998).

The key variable in understanding this history is that of location. The island is found at a superbly strategic site at the tip of the Mediterranean where three continents meet. It has been annexed by every regional empire, in order to provide for their strategic needs. It fell under the suzerainty of the Greeks, Phoenicians, Romans, Byzantines, Normans and Venetians. It sustained a period under Islamic rule, and as a result had its European and Christian cultures also tempered by a Muslim and Arabic/Turkish interface (Pantelli, 1990). A sense of heterogeneous island identity was therefore diffused by the constant exposure to external influences. The island population by the beginning of the 19th century consisted of a Greek ethnic majority and a Turkish ethnic minority that practised different religions, spoke different languages, and adhered to different cultural practices³. When nationalist aspirations were in full force in 19th century Europe, a unified sense of national island identity around a common heritage and history did not develop here. The inhabitants of Cyprus continued to consider themselves Greek and Turk rather than Cypriot (Scherer, 1997).

A study of the numerous Cypriot history books in English, which include Greek-Cypriot and Turkish-Cypriot contributions, illustrate graphically this reality. Such cases include Dodd (1999) or Christodoulou (1992). Rather than a

history of Cyprus the texts detail the exploits of Greek and Turkish communities, within the context of the folk memory, and national myths of Greek and Turkish history. For history books and more so a country's textbooks all too often adopt a dialectic that reflect the needs, the doctrines, and the agendas of the ruling elites⁴. These elites were to be found in Greece and Turkey, for Cyprus attained 'a Cold War' independence. Cyprus was crucial to Greek, Turkish, American, Soviet and British interests. Greece and Turkey, both NATO members, therefore ensured the continued dependence of the island. It granted it a paper constitution, derailed UN efforts in the 1960s that furthered conflict resolution, and blocked the push toward a sovereign independent Cyprus, reflected in Makarios' politics of the early 1970s. The continued politics of *taksim* and *enosis* was essential in ensuring the Cold War regional politics of real-politic. This dictated that there was to be no Cyprus, but only an island inhabited by the forces of two neighbouring regimes (Anastasiou, 1996, 2000; Attalides, 1979; Borowiec, 2000).

Writing history for the external elites

The history textbooks of Cyprus therefore, in line with the demands of foreign elites, do not promote a single nation but rather that of two external nations⁵. In this discourse there is no space for a Cypriot national identity, for this would challenge the separate Greek and Turkish identities which remained paramount for Greece and Turkey ('Greek government ...', 2007). Consequently, a post colonial critique which calls for historical acts of remembering, in order to call up and understand the full dimensions of the country's history, remains absent. Djavit (n.d.) in his article 'How history should be taught in Cypriot schools' indeed talks of the need to develop a Cypriot identity that will defend the independence, the sovereignty and the territorial integrity of the island. However, as Childs & Williams (1997) illustrate, an understanding of one's present and future comes through the knowledge and acceptance of one's national history, thus these narratives are important vehicles to aid the consolidation of the new national state.

The history of Cyprus however is not written with the aim of conferring legitimacy on the Cypriot nation, but rather with legitimising the claims over the island of Greece and Turkey (Byrne, 2000). For Cyprus is the case *par excellence* of the fissures inherent in the Balkanisation of Europe, that have continuously threatened regional stability, and today still represent in miniature the main international relations cleavages waiting to tear our present global system asunder (Ioannides, 2001). Central Europe, through the centuries, has been home to large numbers of fledging small states, all seeking to legitimise sovereign status against the backdrop of contending big powers, intent on continued hegemony in

the region. This David and Goliath scenario is further complicated by a mosaic of relations in the region that include multiple ethnic origins and languages, different cultural ambits of Greco/Roman, Turkish and Russian origins, and a mixture of religious affiliations that include Catholic, Orthodox, Protestant and Islamic strains. Often all present in a single state seeking internal unity and external validation, as borders were often undetermined realities, they are polarised and utilised by these hegemons (Prodromou, 1994; Theophanous & Coufoudakis, 1997; Maiz, 1999).

In this scenario, recounting the history of these nations, and producing coherent school texts becomes of supreme importance, to both internal and external players. What type of national history, what type of national identity, what type of historical awareness is to be promoted? (*Disarming History*, 1999). For ultimately it is the school history texts, as Stojanovic (2001) tells us, that are among the most important means for shaping national identity and historical awareness. Owing to them pupils are at an early age imbued with images of their own nation, its place in history, its characteristics, as well as with images of other neighbouring peoples. This fact indeed gives history teaching a special mission which surpasses its educational task, and turns it into an important instrument of both state and international policy.

Textbooks as a political tool

Indeed, history textbooks and the versions of history they relate have long been recognised as crucial instruments in establishing local, regional and global identity, and the impact they may have on the relations within and between states. Post World War One, the revision of history school textbooks was seen as a part of an important movement to reduce aggressive nationalism and promote peace. Post World War Two, efforts to reconcile warring nations were reflected in UNESCO's programme of bilateral consultations between countries for the improvement of history textbooks. The task set was that of eradicating a truth that stopped at national frontiers, and adopting one that reflected an international conscience that overcame frontiers. Countries, including Germany and France, worked on a version of history that both could live with, and utilise for reconciliation and integration (UNESCO, 1953).

Regional players in this scenario may also however utilise a human being's inherent need to have not only allies, but also enemies. Ozcelik's (2005) psychological approach to the Cyprus conflict illustrates this by showing how national elites do so by encouraging the creation of appropriate stereotypes in national history school texts. This method is conjoined with the inherent need of

individuals to maintain borders, and to preserve identity from contamination with enemy images. These psychological mechanisms are thus utilised to help maintain separate group identities (Spyrou, n.d.). When two ethnic groups live side by side, as in Cyprus, their impact is to make them become increasingly resistant to acknowledging likeness, and rather focus on, or create, differences. In time of peace, these differences are exhibited by dress, dances, speech patterns, and the like. In time of hostility, however, these minor differences assume a major emotional importance; some people have even given up their lives rather than abandon them. This psychodynamic process that affects the formation of psychological borders between two groups is best maintained and illustrated in the history textbooks through the concept of the chosen traumas and glories (Dragonas & Frangoudaki, 2001; Koulouri, 2001).

There are numerous studies illustrating the use of history textbooks as political tools in Cyprus. The theoretical bias is that of a post colonial discourse centred on the counter narratives of absolutism, constructed by the natives upholding an insular vision of homeland, reinforcing the insider/outsider dialectic (Hill Collins, 1990). An approach that factored in an oppositional binary relationship however would be more accurate. This approach is more complicated and less resorted to (Stoler, 2002). For what is needed for a more accurate rendering of the situation in Cyprus is a discourse of complicit post colonialism in line with Mishra & Hodge (1991; cited in Childs & Williams, 1997) who postulate that complicit colonialism is becoming the literary dominant of post colonialism, in conjunction with Said's (1978) critique that there is no such thing as disinterested knowledge, and that all knowledge is contaminated by the web of power (Kurtz, 2001). These schools of thought are in synch with current international relations theory shaped by a realist dialectic that is influenced by a discourse on cultural hegemony. This framework, I believe, would illustrate more accurately the influence that regional or adjacent hegemonies may exert on the history teaching of their client states.

History textbooks call for integration

Research in the area however is complicated by the presence of a number of overlapping and intervening variables. These make it difficult to draw the line between influence and pressure, indeed between complicit or oppositional post colonial phases in a country's history. Undoubtedly if, as Lowenthal (2002) states, history textbooks reflect a particular image society has of its past and indirectly how it imagines its future, then one would have to argue that until recently the futures the two communities in Cyprus aspired to remained that of union with Greece or Turkey (Gregoriou, 2004).

However this situation is one reminiscent of the chicken/egg dilemma. Education in Cyprus has long been sectarian. The production of separate textbooks for the two communities seems to have commenced in 1884 with the supply of textbooks from Turkey for the Turkish-Cypriots. The 1895 Education Law introduced two separate Boards of Education, one Christian and one Muslim. To date two separate groups of textbooks continue to be used linked to the different versions of Cypriot community history found in the North and the South of the island. Many of these texts are produced in the motherlands, others are produced locally, and as a Turkish-Cypriot student Erol Suleymanoglu pointed out, Cypriot history is written by Greece and Turkey for each country's own political ends, harming the identity of Cypriots ('Biased history ...', 2000).

Whether these texts reinforce external hegemony or local aspirations of *enosis* and *taksim* remains disputable. Undoubtedly, however, Greek and Turkish claims to the island are illustrated in the hegemony that they exercise over the portrayal of key events in the two histories of the island ('Greek government ...', 2007). These become forms of mirrored versions of single events. For the historical discourses articulated by rival nationalisms typically operate as oppositional pairs, thus the texts from the North and South both emphasise a number of oppositional stereotypes (Gregoriou, 2004).

A discourse of rival nationalisms

The first is tied up with the all important origins of Cypriot settlement. Loris Koullapis (Greek-Cypriot), in his analysis of Greek-Cypriot history textbooks during a workshop on the subject, shows how they lay emphasis on the Hellenisation of the island in the 12th century BC, and constructed an unbroken (Hellenised) continuity from that time up to the present (see *Teaching Cyprus*, 2000). He adds that the Republic of Cyprus has been functioning since 1963, in educational and ideological matters, as a second Greek national state, and through the educational system it has been receiving ideology and history perception emanating from Athens for the ideological needs of the Greek state.

On the other hand, in *Historical Memory and Communal/National Identity: The Turkish Cypriot Case*, delivered at a workshop that investigated how the two communities are mutually presented in their history textbooks, we are told that 'Ottoman Turks' are spoken of almost as present-day nations, so close in time and space, so internal to the discourse of communal identity. They were the ones who built mosques, bridges, water canals, opened schools, constituted a model of good and fair governance on the island, and believed to have protected both the Muslims and the Christians from the larger evils of the eastern Mediterranean. Their history

on the island was hardly contested, the politics of successive Ottoman governors hardly questioned. The history that they presented was detailed and yet flawlessly smooth; in its vivacity, it delivered a stronger sense of reality than either the British colonial regime or the post 1974 Turkish-Cypriot politics.

Strohmeier, participating in the same workshop, explains that this is tied up with a second oppositional stereotype that links the communities' achievements to military and cultural exploits that are foreign rather than indigenous. This twofold process is found in Turkish and Greek textbooks, both imported and local. Turkish textbooks insist on a victorious military advance through the centuries, while Greek textbooks emphasise cultural continuity and cultural achievements (Ozcelik, 2005). Thus the notion of origin, of continuity, of national pride and identity are attached to the presence of the outsider, the patron, diminishing the context of the indigenous people and the Cyprus-ness that they symbolise.

The third oppositional stereotype revolves around certain key historical Cypriot events, post 1960. The same events are described and interpreted in a very different way, and with a very different vocabulary, depending on the centre of the narration. December 1963 is one such event. This was the Akritas Plan designed to end the new republic by quickly suppressing the Turkish-Cypriot reactions to imposed constitutional change before outside intervention could be mounted. The plan was triggered off by an incident that occurred during a bout of intensified searches. One of these, on 21 December 1963, resulted in the death of two Turkish-Cypriots by Greek-Cypriot auxiliary police forces and sparked off inter-communal fighting. Rampant killings by both communities followed, although undoubtedly it was the Greek-Cypriots that led the rampage. The violence that ensued led to the total or partial destruction of 103 mixed villages and a displacement of about a quarter (nearly 30,000) of the total Turkish-Cypriot community. After their departure Greek-Cypriots burned and demolished their houses and a complete blockade was imposed on the remaining Turkish enclaves (Sonyel, 1997)⁶. In Greek-Cypriot texts these events are at best characterised by omissions and silence⁷. In Turkish-Cypriot texts this is a traumatic event that has been translated into emotional teaching. For Turkish-Cypriots this date, through the discourse of history teaching, is kept within the collective memory, as the community remembers the period as one of tyranny and victimisation (*Education for Peace*, 2004).

Another such key event is 1974: Between 1972 and 1974 conflict resolution seemed possible, and an agreed formula was in the pipeline. This may well have made a unified Cypriot nation a viable enterprise. However conflict resolution was forestalled, and in 1974 Greece invaded the island initiating a coup that overthrew the government of Makarios. Within days Turkey responded by invading the island and appropriating 34% of the land. In 1975 Denktash declared The Turkish

Federated State of Cyprus. The result was a division of Cyprus that is still in place today. The Turkish invasion was followed by the displacement of circa 180,000 Greek-Cypriots who moved South, and consequently lost their land, untold loss of life, and over 1,600 individuals who remained unaccounted for (Joseph, 1997). In Turkish-Cypriot textbooks this event is seen as the ‘the happy end’ for the Turkish-Cypriot community which arrives in 1974 when Turkey undertakes a military intervention (called the ‘Peace Operation’) and divided Cyprus geographically and demographically into two, North and South. Thereafter, ‘the Turkish Cypriots are living happily in North Cyprus’ (*Education for Peace*, 2004, p. 4). For the Greek-Cypriots, 1974 remains the date when everything went wrong in Cyprus, it is a traumatic period of unmentionable loss and betrayal (Demetriou, 2005).

History textbooks: a balance sheet of history

These portrayals tie up with the didactic use history textbooks are put to in Cyprus as a form of balance sheet of history. They become mnemonic devices that build up a rhetoric of blame based on the objectification of the victim (‘History is not ...’, 2004). The purpose, Zelia Gregoriou (2004) tells us, is to create the displacement of ‘Othering’: ‘the process by which, through shifts in position, any given group can be ignored, trivialized, rendered invisible and unheard, perceived as inconsequential, de-authorized, “Other”, or threatening, while others are valorized’ (p. 242). The purpose being to legitimise the position of the insider, and at the same time not to facilitate the political recognition of the other.

This nationalism often deploys racist and exclusionary discourses. This is illustrated in the stories told by the victims expressing a sole view and making the multiplicity of vision impossible. In the service of this agenda, children through their textbooks are exposed to horrific caricatures of their neighbours living only meters away across the Green Line. They are not only the ‘primary other’, but also the occupiers, the invaders, the enemy⁸. Texts use a discourse of highly loaded and emotional language, full of imagery that sustains a notion of an ‘us’ and a ‘them’. There are images of ruthless murderers and innocent victims. This polarising of the self and other was pointed out by the head of the Turkish-Cypriot Educational Planning and Programme Development Department in July 2004:

‘Our texts encourage the student to make enemies. In one part of a history text book it describes how Greek-Cypriots “gouged out the eyes, filled bodies with holes” etc. This kind of language, as well as breeding hatred, can also cause lasting psychological damage to the young reader.’ (Bahceli, 2004)

In both communities, history texts as political tools disallow the use of an analytical methodology that would open the mind and enable understanding (Koussertari, 2004). For within this oppositional discourse, the stereotypes continue to propagate not only an inaccurate rendering of the relationship across the ethnic divide, but even within it. The textbooks invariably portray the conflicts as inter-communal ones⁹. They do not touch on intra-communal conflicts, or those between client states and the mother countries, important variables in order to understand the 1964 civil war, and the 1974 invasions. Thus, the history textbooks reinforce the image of solidarity between patron and client states, with little mention of the relationship of coercion and dependency between the two. While inter-communal relations are never mentioned other than in terms of conflict and brutal violence, school textbooks thus eulogise the external at the expense of inter-communal harmony.

Post Cold War and the need for a Cypriot history

The role of a uniform history in bringing Cypriots together has long been recognised, and there have been numerous discussions on producing joint history textbooks in Cyprus. Indeed, Rustern Tatar (2004), former auditor general of Cyprus, pointed out in a letter to the Cyprus Mail in 2004 that in 1977 he brought to the attention of those participating in the inter-communal negotiations the need for history textbooks on Cyprus that created consensus. It is however only since the end of the Cold War that a real discourse has commenced. This, once more, is tied largely to external remit. Post Cold War, we witness a new regionalisation of Cypriot politics. This is the birth of a new Balkan region, no longer divided by the politics of bi-polarity, which now provides space for the arrival of numerous small states. These states ensure their security and stability through eventual EU membership. Greece, a local hegemon, is by now an established member of the EU, Cypriot membership has been secured, as is the eventual start of accession negotiations for Turkey (Brewin, 2000; Borowiec, 2000; Jimenez et al., 2004).

In this new dynamic, the security and regional interests of Greece and Turkey now became complementary. Turkey is fully aware that without a resolution of Cyprus, membership may prove impossible, and Greece is also fully cognisant that the answer to the riddle of Cyprus lies in Turkey's membership. Both also acknowledge that once membership is granted to all three players, the problems of access and security of Cyprus become largely redundant, and both states would be better served if they could now shed this tiresome powder keg. Thus, for the first time, the interests of both patron states are in line with those of a state of Cyprus, built around the notion of a Cypriot identity (Christou, 2004).

A push toward Cypriot identity politics is now also encouraged by the most important regional player, the EU. For the growth of this organisation had heralded a shift in international politics from realist inter-governmental models based on national discourses and bi-lateral methodologies, toward a more institutionalist, functionalist and integrationist approach, based on multilateral mechanisms. Localised models based on a multi-ethnic Cypriot identity now become feasible within the context of a federalised EU (Zurn, 2000). The locality of Cyprus as a border member of the European Union was now also being articulated as an economic, political and cultural bridge linking the two shores of the Mediterranean, as well as a necessary bridge of mutual understanding and cooperation between the various religions, cultures and ways of life.

Working toward a history of Cyprus

In this new globalised and regionalised climate, the need for communication and collaboration becomes imperative. External players once again acknowledged that the dynamic relationship between past and present affected not only how one understood and interpreted historical facts, but also how human actions would be determined in the present (Terzis, 2000). The complex and highly introvert and conflictual character of education in the region now had to be addressed in order to foster an education of understanding, for regime breakdown in the Balkans was a dangerous imperative in the EU's back yard as the cases of Kosovo and Bosnia illustrated (Molis, 2006; Friesendorf, 2008). In 1997, under the sponsorship of the Council of Europe, numerous associations from different Balkan nations came together to initiate a school of historical revisionism (the Southeast European Joint History Project) (Bonidis & Zarafis, 2006), that would allow the new states to cohabite adjacent and at times even shared spaces. Cypriot historians and teachers participated in these numerous seminars on the reassessment of Balkan history.

Comparative research related to the study of school curricula and textbooks was encouraged. The dialectic here was to be that of peace studies which promoted a history not of war, of political grandeur or political contingency, but rather sought a history of those variables that were central to peoples' existence, and brought them together rather than divided them. These included economic and social history, the geography of history, the environment of history, and a history also of different mentalities and different cultures. The approach was influenced by the annals school and driven by a multilateral, comparative-oriented social research. The ultimate aim was that of changing the image of the hostile neighbour (Bonidis & Zarafis, 2006).

The 'Workbooks Project' is the most recent manifestation of this organisation's work. Its long term aim being to encourage and support reconciliation in the region by allowing children to view the area's shared history from many points of view, thus opening up the past to discussion and debate through a participative and collaborative method of learning. In this way, we are told, the notion that there are many 'truths' and versions of events, as well as many common experiences (rather than just a national viewpoint and an unfavourable image of 'the other') will enable the process of reconciliation for the future to start. Through this innovative pedagogy, the children will also gain the skills and attitudes necessary for an open and democratic society to emerge.

The Council of Europe began a programme specifically focused on history teaching in Cyprus in July 2003¹⁰, on the initiative of the Secretary General and with the agreement of the Ministry of Foreign Affairs of the Republic of Cyprus. In 2004 the Council of Europe organised four activities in Cyprus comprising seminars and workshops which brought together about 400 participants from the two main communities, as well as from Armenian schools, reflecting the fact that Cyprus is multicultural. The focus was on teaching history as multi-perspectivity. An approach reflected in 'Recommendation 15 of 2001' on history teaching in 21st century Europe adopted by the Committee of Ministers on 31 October 2001 (Philippou, 2005).

Further projects were proposed under the Reconciliation Commission (Taki, 2004), which was to come into operation with the Anan Plan. The Commission was to be established to promote understanding, tolerance and mutual respect between Greek-Cypriots and Turkish-Cypriots in the light of the Anan Plan. The work was to include: (i) the promotion of dialogue between Greek-Cypriots and Turkish-Cypriots regarding the past; (ii) preparation of a comprehensive report on the history of the Cyprus Problem as experienced and interpreted by Greek-Cypriots and Turkish-Cypriots; and (iii) recommendations to the federal government and the constituent states for action aimed at promoting reconciliation, which would include guidelines for publications and school textbooks.

The influence of the EU and writing history across the Green Line

The influence of Greece and Turkey over Cypriot history is now being replaced by that of the EU, which now seeks a history which in turn would legitimise and to an extent even mythologise its role both within Cyprus and the region. The search is for a new community history, which would be focused on

a discourse of supra-nationalism. This discourse would focus on a pedagogy of history that looked at the grand project of Europe, and would offset and discourage major historical narratives that are ethnocentric or even narrowly nationalistic. In effect, we have in the making a new normative and institutional memory of this 'new' past, which codifies and homogenises the collective memory in the context of needs of the new external player, the EU, which requires a united Cyprus (Koussertari, 2004; Richmond, 2006)¹¹.

Thus, a new journey has begun in the historiography of Cyprus. Sezai Ozcelik (2005) tells us that it is necessary to deal with historical and psychological barriers to achieve lasting and perpetual peace and political solutions like the Anan Plan. Thus, a school of historians have started analysing the conceptualisation of the minor differences, externalisations, projections, chosen traumas and glories, dehumanisation, victimisation, and ethnic identity (Yuksel, 2006). This is being done to gain a greater understanding of the historical, psychological and political barriers between Turkish-Cypriots and Greek-Cypriots.

Increasingly, teachers and students from the two sides of the Green Line are demanding history teaching that is fair to both communities. In a bi-communal seminar at the Ledra Palace in 2000, the Bi-Communal Teachers Training Centre hosted *History: How Do We Teach it, How Should It Be Taught?* with support from the Fulbright Commission in order to promote inter-communal peace through education ('Biased history ...', 2000). Dimitris Tsaousis, a 17 year-old student, asked why so much 'blind gut hatred' exists among his Greek-Cypriot peers, none of whom were even born at the time of the invasion. He laid the guilt for this prejudice on a politicised education system that demonises one side and naively praises the other ('Biased history ...', 2000). In 2004, the head of the Turkish-Cypriot Educational Planning and Programme Development Department, Hasan Alicik, made history with a project that aims to bring sweeping changes to the way history is taught in Turkish-Cypriot Schools. His task has been to create a syllabus that will give 'an objective view of Cypriot-history' (Bahceli, 2004).

In 2008, a new EU Association Life Long Learning Programme that is to run till 2010 was inaugurated¹². The project aims to develop innovative regional teaching materials, and the strengthening and professionalisation of history teachers and educators when dealing with multiculturalism and diversity in schools, especially in history teaching. A core-group of history educators from both parts of Cyprus are to be involved in training seminars to develop alternative teaching materials and to become experts in innovative history teaching. The discourse here is multi-perspectivity, viewed as fundamental to the teaching of history.

Problem solving and unanswered questions

However Cyprus is not yet unified, the Anan Plan floundered, and the North of Cyprus remains excluded from the EU. These setbacks are reflected in the continued struggle to frame a unitary vision of a Cypriot state. Gregoriou (2004) illustrates these setbacks by explaining that in 2002 *The Modern and Contemporary World, 1815-2000* for third grade lyceum students was published by the Organisation for the Publication of Textbooks, under the auspices of the Greek Ministry of Education and the Greek Pedagogical Institute. Depicting EOKA (a Greek-Cypriot nationalist military resistance organisation that fought for the end of British rule of the island, for self-determination and for union with Greece) as a socially super-conservative nationalism, the book was attacked for belittling the memory of national heroes, and provoked the reaction of the Cypriot Minister of Education who submitted a letter of protest. The depiction of the anti-communist aspects of the liberation struggle provoked an attack also against the post colonial demythologisation of the past. In another case, the *Cyprus Mail* (see 'It's our choice ...', 2007) recounts how in 2007 a new history textbook for 11 year-olds also ignited the wrath of clergymen and nationalists. The textbook's revisionist view of the Greeks' 1821 war of independence against the Ottoman Empire, and the flight in 1922 from Smyrna, modern-day Izmir in Turkey, was condemned by some as especially unpatriotic.

As recently as March 2008, Andrekos Varnava in the *Cyprus Mail* stated that:

'Education reform is indeed linked to reunification. Changing how society views itself, however, starts with education of the young. Most of the textbooks produced in the island in the humanities and social sciences, especially the history textbooks, give a distorted picture of Cyprus' past. They monolithically project the idea that Cyprus has always been Greek, that the Greekness of Cyprus was preserved during times of foreign oppressive occupations, and blame others for the division of Cyprus. They deny the multicultural history of Cyprus; the involvement of 'Greek' elite in the ruling class of the country; the common hardships and joys of the various communities at the lower strata of society; uncritically review contemporary history; breed hatred of Turkish-Cypriots; and, in short, are one-sided in their pursuit of the Greek or Greek-Cypriot nationalist discourse, thus poisoning children's minds against other communities, particularly the Turkish.' (Varnava, 2008)

In Cyprus today forces remain that view the island's politics and history within a constricted vision of narrow communal interests, formatted, within a dialectic of complicit colonialism ('It's our choice ...', 2007). However there also seems to be a general agreement that education plays a crucial role in furthering reconciliation.

There is also general agreement that Cyprus needs textbooks that teach diversity and tolerance, that teach children how to coexist in multicultural and multi-ethnic societies, that teach children that there is no one truth in history, that history generates conflict and that it is imperative that we learn to understand the reasons for that conflict.

There is also general acknowledgement that peace education, conjoined with a Galtungian philosophy of conflict resolution, needs to become the current coinage within the teaching of history. However, the case of Cyprus also illustrates the gap that exists between theoretical models and their practical applications. For the former often tells us little about the latter. In this case, what cultural models will be adopted? Will they include all minorities – for instance, the Armenians? What place will the new Turkish community, who have now settled on the island, be given in this new history? What language or languages will these textbooks be in – Greek, Turkish, English – and will these numerous languages be sustainable? What sources will be cited; Greek, Turkish, English? How will this history be taught? Will it be taught in co-educational schools? Will the production of textbooks continue to be completely state dominated? And if the onus for change continues to come from external players, will this affect the pace of change? These are questions that are being asked in Cyprus today. For in the final analysis there is a growing recognition that in Cyprus a space needs to be created for historians to write a history of Cyprus that is not tied to specific interests, internal or external, but allows the texts to reflect a multiple and sophisticated layering of history. Through these texts, a cacophony of voices will emerge, the voices of the Cypriots, a voice of Cyprus. Cyprus needs a common past, in order that it can have a common future. Under the new post Cold War scenario this space has opened up, and this enterprise is now possible.

Notes

1. This chapter was written after I concluded a much larger project, my PhD dissertation which focused on *The Role of External Players in Democratization in Southern Europe: The Cases of Malta and Cyprus*. My dissertation, which involved field work in Cyprus and a detailed analysis of original documentation, allowed me to gain some understanding of events in Cyprus. One, however, while working on any piece of research, struggles with one's limitations. In this case I was the outsider struggling to understand a society which though I recognised had parallels to my own must remain in part a mystery to me. I also spoke neither Greek nor Turkish. This shortcoming was offset in part by the huge documentation on Cyprus in English, including native newspapers, UK Public Record Office documents and EU documents. Nonetheless, at times I felt the constraints of not knowing the languages of Cyprus, and never more so than in writing this chapter. For though there is a large literature that deals with the writing of Cypriot history textbooks which enabled me to write this article, I would

have much preferred also being able to consult the textbooks themselves. This unfortunately was not possible, and I therefore had to rely on others for an understanding of what lay between the pages of Cypriot history textbooks.

2. Kizilyurek in *History Textbooks and Nationalism* elaborates on the two different nationalisms that these textbooks illustrate and the fear of abandoning their different versions of national history.
3. Though Pantelli (1990) argues that a real cleavage did not emerge till the 20th century. Byrant (2001) and Theophylactou (1995) also sustain that the development of a Cypriot consciousness and identity is possible.
4. Reynolds (2005), in *In Command of History*, talks about Churchill's six volume text on the history of world war two and the economic, political and cultural pressures that influenced the first draft and its Anglo-centric approach.
5. 'In contemporary Cyprus, the ascription of ethno-religious identity is highly political and juridical. Contrary to the submitted report of the Republic of Cyprus (RoC), this paper argues that the gist of the difference – and of the 'Cyprus problem' – lies precisely with how groups and communities are described in official and popular discourse' (Constantinou, 2006, p. 2).
6. DO220/39 *Incidents from 21st-31st December 1963*; DO 220/47 *Cyprus situation 12-18/05/64*.
7. Look at the book *The Island Everyone Wanted: An Illustrated History of Cyprus* by Christofides & Lambrou (2007). While this book has a short chapter on 1960 followed by one on 1974, 1963 is not mentioned.
8. 'Unfortunately, Serter's book encourages the student to make enemies, and we were convinced that such an approach is not productive' (Bahceli, 2004).
9. 'Dimitris Tsaousis, 17, asked why so much "blind gut hatred" exists among his Greek Cypriot peers, none of whom was even born at the time of the invasion. He laid the guilt for this prejudice on a politicised education system that demonises one side and naively praises the other' ('Biased history ...', 2000).
10. History teaching activities of the Council of Europe in Cyprus in 2004. Background information and proposals for on-going cooperation in 2005. Item for consideration by the GR-C at its meeting on 10 February 2005.
11. Note the emphasis on a postmodern approach suggested by Thomas Diez (2000).
12. A three-year partnership agreement (2008-2010), together with a specific (and renewable) agreement for an operating grant for 2008, has been proposed to the European Union Directorate General Education and Culture under the Life Long Learning Programme.

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CHAPTER 4

Dis/integrated Orders and the Politics of Recognition: Civil Upheavals, Militarism, and Educators' Lives and Work

ANDRÉ ELIAS MAZAWI

Given the Arab region's turbulent political and military histories, the virtual absence of studies that examine educators' lives and work, when the socio-political order disintegrates or collapses, is striking. This chapter has two aims: first, it calls for the articulation of new research horizons concerned with the 'modes of being' of educators as actors embedded within dynamic contexts of practice; second, it emphasises the need to articulate an 'epistemology of seeing' through which research on educators' lives and work can recognise educational leadership as constructed within multi-faceted and conflict-ridden contexts.

Problematic

The burgeoning literature on education in conflict and post-conflict contexts identifies the powerful intersections among schooling, civil upheavals, and militarism as expanding areas of scholarly research and policy making. The literature also underscores the recognition of schooling and education as central to a 'humanitarian response' organised by states, international governmental and non-governmental organisations that undertake post-conflict reconstruction (Retamal & Aedo-Richmond, 1998; Aguilar & Retamal, 2009). This expanding interest has been recently actualised in several special issues in the field of comparative education. A special issue of *Research in Comparative and International Education*, guest edited by Julia Paulson (2007), focuses on the tensions that underpin the provision of education in contexts marked by civil and military upheavals. Contributions highlight the role education plays in constructing people's engagement in violent civil and armed upheavals, such as in the Great Lakes region in Africa (Bird, 2007). More particularly, Chelphi-den Hamer (2007) investigates how the administrative structures that regulate schooling are affected in countries torn apart by civil wars, such as in Côte d'Ivoire. Pushing one step further, a special issue of *Comparative Education Review*, guest edited by Lynn Davies & Christopher Talbot (2008), offers a series of ethnographic field studies that illuminate the role schools play in the social re-integration of former child soldiers in Sierra Leone (Betancourt et al., 2008), the

inclusion of Burmese ethnic refugees in Thailand (Oh & van der Stouwe, 2008), and the enhancement of children's well-being in Afghanistan and Africa (Dicum, 2008; Winthrop & Kirk, 2008).

In a particularly compelling study, Hromadžić (2008) clarifies how civil war and militarised conflict result in the institution of 'new' types of school within multi-ethnic and deeply divided societies. Studying Bosnia and Herzegovina, Hromadžić describes the 'collision' between two groups – international actors intervening in the conflict and the Croat political community – over the integration of 'national minorities'. This clash of principles resulted in the creation of a high 'school [which] now has a unified management, while preserving ethnic segregation and the ethos of segmental autonomy' (p. 542). As Hromadžić explains, the 'materialization of a new form of school that is concurrently 'shared' and 'separated' creates a new type of school geography in [Bosnia and Herzegovina], one based on the ideology of ethnic symmetry and polarization of youth' (p. 542). In striking contrast to this perspective, a special issue of *Comparative Education*, guest edited by Larsen & Mehta (2008), turns the problematic of conflict and geopolitical military upheavals around. It focuses on 'the manifestations, implications and effects of insecurity and desire across the field of education in North America' (p. 256) and how these shape educational discourses and practices in Canada, the US, and Mexico in the post-9/11 period.

Notwithstanding the examples mentioned above, and despite educators' vulnerability when it comes to civil and military upheavals, studies that delve into educators' lives and work remain rare. Curiously, this is particularly so in teacher education and educational leadership journals¹. Kirk & Winthrop (2007) conclude, 'teachers working in emergency and post-conflict contexts have so far received little attention from researchers' (p. 721). Perceived by military apparatuses and insurgent groups alike as bearers of knowledge deemed ideologically threatening, the location of educators within schools emphasises their potentially subversive actions, as was the case, for instance, in Vietnam in the 1970s-1980s (Cassidy, 2006, p. 156). During the decolonisation of Algeria in the 1950s, teachers were located at the juncture of comprehensive social and political transformations (Le Sueur, 2005). Still, for embattled regimes, school teachers and university professors present a readily available group that can be drafted into the army as was the case, for instance, during the Iraq-Iran war of the 1980s (Hiro, 1991, p. 175; 'Allaq, 1997, p. 96). Not least, in post-conflict contexts, educators – particularly history teachers – act as 'critical' witnesses in the 'public construction' of memory. They create spaces of remembrance and 'memory making' that are crucial in the process of reconciliation and reconstruction (Dreyden-Peterson & Siebörger, 2006; see also Baranović, Jokić & Doolan, 2007).

In all this, the virtual absence of systematic studies that explore the impact of military conflicts and civil upheavals on schooling in the Arab region is striking, and more precisely and particularly so against the backdrop of the region's turbulent military and political histories. At different points in time, schools across the Arab region have operated (and some continue to operate) despite the collapse of the state or disintegration of central political authority. This would apply to societies that experienced (or are experiencing), at different points in time, extended periods of upheaval, such as in Jordan (Sirriyeh, 2000), Lebanon (Frayha, 2003), Algeria (Cheriet, 1996), the Sudan (Graham-Brown, 1991), the Occupied Palestinian Territories (Al-Zaroo & Hunt, 2003), and Iraq (Velloso de Santisteban, 2005), to name but a few. While it is true that schools across the Arab region have become part of highly differentiated national systems of education, there is hardly a contemporary society across the Arab region that has not experienced a radical, and often violent, upheaval of its civil and political orders at least once since the end of World War II. In some societies across the region, social, political, and military upheavals are the norm rather than the exception; entire generations recognise civil and military upheaval as the only order. Yet, the few sources available allow only fragmented insights into what educators who toil under such conditions do, and how they engage a collapsed or collapsing socio-political order, or the militarisation of daily life within schools and communities.

The following question remains therefore largely unexplored with regard to the Arab region: how do educators pursue their understandings of education and schooling when the civil order and political regimes collapse, disintegrate, or are violently reconfigured through military operations? In this chapter, I address this particular question and discuss its underpinnings and ramifications, as well as its ontological and epistemic implications for studies of educators' lives and work in the Arab region and beyond.

Conception

The study of educators' lives and work during periods of upheaval faces conceptual, methodological, and logistical challenges. Some of these challenges are associated with access to and availability of archival materials, community-based records, and, not least, witnesses (see, for example, Suleiman & Anderson, 2008). Makkawi (2002) also cautions that interviewing educators about matters that are politically sensitive may expose them 'to undue harm' (p. 51).

One should not belittle conceptual challenges facing such an endeavour. The current dominant themes of studies concerned with educators' work revolve around school effectiveness and student learning within stable national systems.

A heavy emphasis is placed on 'best practices', identifying professional standards and accountability mechanisms for educators (see, for example, World Bank, 2008), and international comparative studies of student learning (e.g., TIMSS, PISA) (Stack, 2006). This leaves little space for studies that explore the actions and judgments of educators during periods of social, political, and military upheaval. The latter are perceived as structurally transitory circumstances, devoid of specific and long-term value for our understanding of educators' work.

Here, it is useful to invoke Goodson's (1997) observation that 'at precisely the time the teacher's voice is being pursued and promoted, the teacher's work is being technicised and narrowed' (p. 111). The 'paradox' Goodson refers to is well reflected within certain strands of educational research by rigid lines of demarcation drawn between the private and public spheres that separate educators' lives and work. Articulated in the form of accountability regimes, these lines of demarcation recognise educators' performance skills exclusively within classrooms and schools, to the exclusion of other forms and spaces of engagement and pedagogical action. These distinctions operate as regimes that ultimately 'discipline' educators into pre-inscribed and surveilled roles (Anderson, 2001) while 'trivialising teacher education' (Johnson et al., 2005). And yet, when social and political orders collapse in the midst of military and armed conflicts, and state surveillance and regulative power dissipate, educators may become engaged in myriad sites of action, outside the direct regulative power of established accountability regimes. This can occur within and outside communities, schools, and classrooms; as part of social and political movements, and organisations; and as part of newly constituted social groups (refugees, internally displaced persons, volunteers, community leaders, insurgency groups, and so forth). This suggests that under upheaval circumstances the private lives of educators acquire public political overtones, and vice versa, thus offering new configurations within which educators pursue their understandings of themselves and of their work. Several questions thus arise: how do civil and military upheavals reconfigure the distinctions between the private and public dimensions of educators' roles? How are these shifting distinctions leveraged into emergent 'modes of being' and 'relational identities' (Mouffe, 2005, pp. 6-8)? How do they shape not only educators' work, but also the alternative horizons and spaces through which citizenship, affiliation, and professionalism in subsequent periods of reconstruction are articulated?

The questions posed above identify educators' lives and work under upheaval conditions as critical spaces, worthy of sustained exploration. They allow a critical interrogation of educators' engagement in relation to a broader political theory of action. They also problematise the arbitrary distinctions between educators' lives (private) and work (public), avoiding their articulation as a Manichean set of

opposites. Furthermore, they highlight the need to understand how educators locate themselves and the meanings of their lives and work outside the exclusive framework of state apparatuses and regulatory regimes. These questions open up new spaces to explore both how educators enact their subjectivities within the context of specific historical, social, and political circumstances, and how these subjectivities are then re/inscribed in the field of power in relation to which the school, as a dispenser of education, acquires its meanings.

With regard to the Arab region, addressing these questions would offer a corrective to the over-emphasis placed on the role of the Arab state (Ayubi, 1995) as the exclusive framework within which educators operate and from which they draw the meanings they attach to their work. Such an exercise would also clarify, in the words of Starrett (1998), 'how scholarship, in creating the objects of its study' – in this chapter: educators' lives and work – 'often acts to reproduce the very intellectual categories it argues explicitly against' (p. 59). Equally, it would unsettle the policy spaces that are currently being narrowed as a result of neo-liberal policies implemented in the field of education and social welfare (see, for example, Baylouny, 2008). In these spaces, educators are represented through uniform and essentialised discourses which claim that '[g]roup work, creative thinking, and proactive learning are rare' among educators in the Arab region (World Bank, 2008, p. 88). Not least, exploring these questions repositions educators across the region within their multi-faceted contexts of practice, and clarify the 'political anatomy' (Foucault, 1979, p. 28) through which educators mediate power and its cultural underpinnings.

Contexts

To illustrate the issues and challenges facing educators' lives and work in contexts of upheaval, I draw upon the distinct cases of the Palestinian society and the southern Sudan. The case of the stateless Palestinian society offers insights into educators' lives and work under continued colonisation and military occupation. The contrasting case of the southern Sudan provides an opportunity to reflect on educators' lives and work under conditions of internal colonialism and prolonged civil war within a deeply fragmented multi-cultural and multi-ethnic state.

Palestinian society

The lives and work of educators in Palestinian society continue to be powerfully intertwined with the socio-political and military upheavals experienced by Palestinians since the early 20th century. Tibawi's (1956, pp. 193-212) account of

the British administration of the Arab school system in Palestine (1917-1948) documents the roles many Palestinian educators played in organising community insurrection, as well as devising texts that by-passed government censorship and administrative control as the Palestinian national movement gathered momentum in the late 1930s and 1940s. If these years saw the emergence of educators as a professional group and as a 'leadership class', it is also true that educators represented the ideological backbone of a rising middle and middle-upper class, particularly in the urban centres of mandatory Palestine (Mazawi, 1994).

The 1948 *Nakba*, or Catastrophe, witnessed the territorial dismemberment of mandatory Palestine, the displacement of several hundred thousand Palestinian refugees across the Middle East and beyond, the destruction of over 400 villages, and the depopulation of the major urban Palestinian centres (Khalidi, 2007). As a result, between 1948 and 1967, Israel, Jordan (West Bank), Egypt (Gaza Strip), and the United Nations controlled school systems that served Palestinians². Following the occupation of the West Bank and Gaza Strip by Israel in 1967 and until the signing of the 'Oslo accords' in 1993³, Israel controlled both the schooling of Palestinian citizens of Israel through the Israeli Ministry of Education, and of Palestinians in the occupied West Bank and Gaza Strip through the apparatuses of the military administration. In both contexts, the textbooks in the fields of history, geography, literature, and civics reflected this political control through the marginalisation, if not exclusion, of references to Palestinians as a nation with rights to their land (see, for example, Al-Haj, 2005; Moughrabi, 2001).

The year 1948 and the period that followed irremediably transformed not only the experiential realities, lives, and work of Palestinian educators – and of Palestinians in general – but also the social class composition of the teaching profession. From that time forward, educators represented the largest professional group in Palestinian society, and a proletarianised one at that. Many teachers originated from refugee and/or lower socio-economic class backgrounds (Brand, 1988, p. 145).

Within Israel, the citizenship of Palestinians is still contested terrain, in a state defined by its legislators as 'Jewish and democratic'. This definition leaves unsettled the spaces open to all citizens to participate in shaping the public good, regardless of their ethnicity or cultural affiliation (Jamal, 2007a). It also narrows, according to Jamal (2007b), the scope and breadth of legitimate political action, leaving the citizenship of Palestinians 'hollow' and 'devoid of substantive meaning'. Palestinian educators in Israeli schools that serve Palestinians are thus subject to clearance by the General Security Services (GSS), with the latter being involved in matters of hiring, dismissal, or promotion (Adalah, 2004). Moreover, deeply entrenched policies and practices discriminate against Arab schools in resource allocation and educational opportunities (Human Rights Watch, 2001;

Golan-Agnon, 2006). Notwithstanding such inequities, Makkawi (2002) observes that, despite their structural dependency, ‘Palestinian teachers have developed unique techniques to attend to the cultural and national expectations of their community and students without putting their jobs in jeopardy’ (p. 51). According to Nasser & Nasser (2008),

‘Teachers may use implicit messages to make students doubt the validity of knowledge presented in textbooks but, simultaneously, they have to emphasize that these textbooks are required for passing examinations and for academic success ... The end result of this complex situation is lack of trust in the school curriculum and the textbooks’ cultural, historical, and political messages.’ (p. 643)

In the Israeli occupied West Bank and Gaza Strip, the lives and work of educators (as that of Palestinians in general) were subject to military administration until the coming into being of the PNA. Educators’ work and classroom behaviour was heavily controlled by the Israeli military. Attempts to unionise teachers were often curtailed (‘Assaf, 2004). Moreover, distinctions between government schools, private (church) schools, and UNRWA schools meant that educators were subject to differential work conditions and incentives, as well as to different regulations concerning their terms of service. These institutional distinctions – which persist in Palestinian society – are also powerfully associated with social class distinctions.

With the eruption of the first *Intifada* (Uprising) in the West Bank and Gaza Strip in December 1987, educators and communities in some localities in Palestinian society organised educational provision as part of a widespread and prolonged civil insurrection against Israeli occupation⁴. With schooling banned by the occupying Israeli military, teaching was organised in alternative locations (Mahshi & Bush, 1989). Graham-Brown (1991) notes that, during the *Intifada*, the ‘educational system in the Occupied Territories, from kindergartens to universities, has been shut down for many months at a time over a period of more than three years, effectively punishing the population by withdrawing opportunities for education’ (p. 56). More recently, under the second *Intifada*, following the collapse of the ‘Oslo accords’ in 2000, Sultana (2006) and Shalhoub-Kevorkian (2008) undertook compelling field studies into the multiple ways through which educators, students, and communities organise the schooling experience in the occupied West Bank and Gaza Strip⁵. These authors document how Palestinians (including educators) resist and attempt to circumvent the militarisation of daily life, and how they confront check points, arrests, killings, bombings, continued colonisation, and widespread settler violence in order to maintain school routine.

Yet, even following the creation of the PNA in 1994, schooling remained affected by continuing Israeli intrusions, the intensive expansion of settlements, the recent construction of a separation wall on the West Bank (which fragments Palestinian communities from within), a deteriorating economy, and vehement intra-Palestinian struggles over the emerging structures of a Palestinian state bureaucracy. Clashes over work conditions between the PNA and teachers' unions led to strikes and to punitive measures against some teachers, including transfers to different schools (Nicolai, 2007, pp. 104-105). Within this larger context, the lives and work of educators have been devastated, making it 'impossible' for educators 'to discuss moral education in the case of Palestine while the conflict is still there' (Affouneh, 2007, p. 354). With children and youth in Palestinian society representing well over half the total population, this means that educators – as family members, income providers, and as professionals – stand at the junction of intense economic, political, organisational, and curricular challenges. These challenges are felt particularly in schools located in rural areas (villages), in which educators often work in rudimentary conditions and inadequate buildings, lacking support and basic resources. Due to a severely overburdened infrastructure, some schools must operate in two shifts, particularly in the Gaza Strip where an already precarious infrastructure was destroyed by Israeli bombardments and air raids in December 2008-January 2009. Educators toil in overused and dilapidated facilities; they are underpaid, and must function with less than minimal physical and professional spaces, despite efforts and projects to the contrary. One young Palestinian teacher, transferred as a counsellor to a rural primary school, poignantly reflected on his working conditions, observing that the school 'actually resembles a tomb' (Al-Khawaja, 2009, p. 9).

For many Palestinians, either in Israel or in the West Bank and Gaza Strip, teaching is a major occupational outlet. This reflects the relative inaccessibility of labour markets to Palestinian workers, whether as a result of occupational discrimination and marginalisation in Israel (see, for example, Sa'di & Lewin-Epstein, 2001), or as a result of the dire state of the Palestinian economy in the West Bank and Gaza Strip (Perlo-Freeman, 2008). Differences in gender participation in the teaching profession among Palestinians are mediated by class-based, political, economic, and geographic factors. Moreover, intra-organisational factors mediate women's relative visibility and access to power positions within schools⁶.

The Sudan

The Sudan offers quite a different context within which educators and schools operate, a context marked by internal colonialism and secession of some southern provinces as part of a two-decade struggle over the distribution of political power

and national resources. Since its independence in 1956, civil and armed conflicts have not abated, leaving over two million people dead and massive displacement among diverse ethno-cultural, regional, and religious communities. The formation of the Sudan Peoples' Liberation Army (SPLA) in the early 1980s, and the subsequent emergence of its political wing, the Sudan Peoples' Liberation Movement (SPLM), should be understood against this backdrop. The conflict is often perceived as pitting a dominantly Arab Muslim north against an ethnically, religiously, and culturally diverse south. However, military and armed conflicts and struggle over power transcend these broad lines of demarcation and extend within groups and regions (Lesch, 1998; Dean, 2000; Deng, 2005).

In the late 1980s, the Sudan's ruling elite promoted the Arabisation of instruction and the Islamisation of curricula in all educational settings, thus exacerbating existing ethnic and regional tensions (Breidlid, 2005; Lesch, 1998, pp. 143-145). Constitutional legislation in 1998 attempted to mitigate the pervasive effects of continued political instability by introducing a scheme for the devolution of powers. In the field of education, responsibility would be shared between federal and provincial (state) governments. Within this framework, southern communities and their organisations introduced curricular changes to preserve their identity, heritage, and rights to difference and self-determination in relation to the Sudanese state. A peace agreement was subsequently signed between the federal government and the SPLM in 2004, recognising the right of the southern region to self-determination (Deng, 2005).

However, a protracted civil war took its toll on schools and on the work of educators. Public services have collapsed in the Sudan's southern and western regions, including in Darfur. Sommers (2005) refers to 'educational islands, as well as the immensity of educational emptiness that has arisen between them' (p. 24). The material poverty, the displacement and dismemberment of communities, as well as the fragmented intervention of international aid agencies and non-governmental organisations: all these leave little space for educators to provide a meaningful schooling. Described as 'an educational disaster' (Sommers, 2005, p. 251) that left a school system 'in shambles' (Joint Assessment Mission, 2005, p. 7), two decades of civil war 'have robbed a generation of their opportunity for education' (Joint Assessment Mission, 2005, p. 16). Surveys report an overwhelming absence of qualified teachers (only 6% are qualified), dilapidated school facilities, and a widespread lack of school textbooks and any form of organisational support⁷. Moreover, teaching is a provisional placeholder as '[g]ood teachers have left the profession to join NGOs that pay better salaries' (Joint Assessment Mission, 2005, p. 10)⁸. Particular challenges face the education of refugees and persons displaced either within the Sudan or in refugee camps in adjoining countries. Warring factions are also implicated in the forced

mobilisation of both teachers and students (child soldiers) into the armed conflicts (Sommers, 2005), thus further weakening the already limited capacity of relief organisations to sustain school facilities over time. Not least, significant disparities exist between ethno-cultural and religious communities in the southern Sudan in terms of their capacity to pool material resources through local churches and indigenous community institutions and organisations, with the view of maintaining a meaningful educational provision.

Kirk (2004) reports that women represent about 6% of all teachers in the southern Sudan, despite a women to men ratio of 2:1 in the general population, due to war-related mortality (see also Joint Assessment Mission, 2005, p. 16). In some provinces, women represent not more than 2% of all teachers. Within men-dominated schools, women are employed in conditions of cultural and organisational peripherality; they are assigned heavy workloads, and have very few prospects of assuming positions of responsibility or even receiving meaningful payment for their work. Kirk's (2004) paper raises important questions about the impact of wars and armed conflicts on the gendering of teachers' opportunities within schools. It also suggests that teachers are embedded within the larger conflicts in ways that further exacerbate the workings of schools.

Reflections

Four main observations emerge from the discussion so far. First, educators play a significant role in processes of decolonisation and national emancipation. Educators' engagement is part of larger processes of urbanisation and class formation, which underpin the broader struggle of colonised societies. *Qua literati*, they play a significant role as public intellectuals or politically engaged members of their communities, and as bearers of liberation ideologies and constructors of national identity. Yet, the capacity of educators to engage social and political upheavals is significantly challenged under conditions of internal colonialism and prolonged civil wars that occur among unequally organised ethnic/cultural communities living largely in rural areas dependent on agriculture or seasonal pastoralism. In this context, educators' work falls between relief intervention and social-economic development, with all the ensuing competing demands placed on educators and on the operation of schools. On the one hand, educators are perceived as front line actors providing humanitarian assistance, particularly to children and youth (who represent the largest age group in society), and to impoverished and marginalised communities. On the other hand, educators' work is perceived as an important institutional medium through which refugees, displaced persons, and child soldiers can be re-integrated into their communities through the acquisition of skills and knowledge (Kirk & Winthrop, 2007, p. 715).

Within this 'double bind', educators struggle with competing social and economic agendas in relation to which schools need to position themselves in order to remain viable in periods of upheaval.

Second, under civil and military upheavals educators' lives and work are radically reconfigured in terms of their geographic locations and the physical and social spaces within which schooling operates. Here, one thinks particularly of conditions of refugeedom, displacement, and spatial relocation. These processes assume transnational dimensions and dynamics, taking place across geopolitical regions and national borders. Moreover, educators are involved in the appropriation and/or construction of new sites of action, within homes, shelters, refugee camps, and new (urban and rural) communities. Educators' engagement also becomes embedded in new institutional and social forms that span organisational lines. These processes remain the least studied and understood, however, despite their critical importance for the ways through which educators negotiate meanings regarding their lives and work outside the framework of state support.

Third, in the illustrations above, educators are far from being exclusively engaged in front-line routinised teaching within the classroom, as is so often depicted in the literature (see, for example, Massialas & Jarrar, 1991, p. 143; Berger, 2002, p. 37; World Bank, 2008, p. 88). Rather, they emerge as engaged both within and outside classrooms and schools, within and in relation to their communities of reference, interacting with particularly complex, challenging, and highly unrewarding socio-political and geographic environments. And yet, depictions of educators in the Arab region have systematically cast aside these larger contexts of engagement in understanding educators' lives and work. Moreover, educators in contexts of upheaval often show resourcefulness and engagement within particularly harsh conditions (see, for example, Al-Khawaja, 2009, and other contributions in the same issue). Notwithstanding, studies of educators' lives and work have remained adamant in fixing their gaze on educators' work exclusively in relation to formally mandated curricular texts within classrooms. Educators' voices in other areas of practice that are part and parcel of their daily lives and work are thus effectively silenced. The argument advanced here should not be interpreted as claiming that processes of resistance/engagement are representative of all teachers within all contexts, not even at the same point in time. Rather, I argue that an examination of the engagement of educators in contexts of social and political upheavals provides evidence of alternative modes of educational leadership that transcend the narrow confines of the classroom and go beyond 'frontal' teaching. It is important to capture these nuanced facets in educators' work across the region. Only thus is it possible to appreciate the positioning of educators in relation to the larger dynamics operating

within the field of power, and the impact this has on the provision of schooling during civil and militarised upheavals.

Fourth, rare are the studies that unpack how the experiential gender and class-based realities of educators impact their lives and work in diverse contexts of practice across the Arab region. All particularly, voices of women educators remain largely excluded and their 'contrapuntal readings' of schooling left unheard. This denial of voice is further exacerbated when it comes to understanding how intersections of patriarchal, social class, ethnic, cultural, and spatial-geographic forces *differentially* mediate the impact of conflicts on educators' practice; how these forces are actualised through the construction of gendered and class-based 'discursive practices' within schools; and how these discourses in turn amplify the effects of civil war and military upheavals on the operation of schools and on teachers' lives and work.

Horizons

Researchers have largely marginalised the experiential realities of educators' lives and work in the Arab region, as selectively illustrated above. Moreover, a cursory review of Arab scholarly publications and journals, as well as studies published in English by researchers working in the region, reveals that studies of educators' lives and work are, with some notable exceptions (Nuwayr, 2001; 'Assaf, 2004; Clarke, 2008), entrenched in the measurement of attitudes, skills, and knowledge of educators in relation to school efficiency or effectiveness (see, for example, Saleh & Kashmeeri, 1987; Al-Jaber, 1996; Halawah, 2005; World Bank, 2008). This state of affairs does not only reify educators' professional judgment. It also prevents the articulation of a praxis framework through which educators in the Arab region can best understand themselves, the work they perform, and the challenges they face in relation to larger power struggles.

Not least, the uncritical extension to the Arab region of educational leadership models developed in Western societies dismisses vital cultural dimensions of local contexts of conflict and their political and geopolitical underpinnings. This effectively detracts attention from the core social and political issues that impact schooling in the Arab region. It also constructs educational leadership in ways that operate an ontological and epistemic disjuncture between the experiential realities of educators and the formal ways through which their professional judgments and performance are assessed. For instance, in one reform initiative carried out by American consultants in the United Arab Emirates (UAE), not less than the Interstate School Leaders Licensure Consortium (ISLLC) Standards were adopted in order to 'provide a profile of a person intended to lead the reforms to

school management' (Macpherson, Kachelhoffer & El Nemr, 2007, p. 67). While the authors do state that they have adopted the standards 'not uncritically' (p. 65), and that they were 'indigenized' by the authors in consultation with Arab and Islamic colleagues' (p. 67), the 'intended learning outcomes' do not provide a clear idea how this was done⁹. The authors remain particularly silent on how the ISLLC standards were 'indigenised' at the light of the social, political, cultural and economic transformations brought about by a UAE transient workforce composed overwhelmingly of expatriates, and in a context in which citizenship is the preserve of the very few. In making sense of Macpherson et al. (2007), one may find some consolation in Thomas (2007) who reminds us that the 'lack of appropriate contextualization' in studies of educational leadership in Gulf Arab societies 'may lead researchers to incorporate ethnocentric attitudes and perspectives into their studies ..., inadvertently reinforcing the bias they claim to counter and leading to further false conclusions and consequent inappropriate policy implementation' (p. 212). He further explicitly warns that failure to conceptualise properly the extension of educational leadership models from one cultural context to another 'has led to claims that many findings are confused because they use cultural terms arbitrarily, ignore appropriate levels of analysis and fail to deal with conceptual and methodological problems arising from how cultures are measured and leadership assessed' (p. 214)¹⁰.

Opening up new spaces for research on the civil and military upheavals that affect educators' lives and work in the Arab region requires therefore the articulation of contextualised conceptual approaches that build, epistemologically and ontologically, on local, national, and community histories and on educators' experiential realities and voices in relation to which their work could be meaningfully engaged. This approach would require, if one draws on Goodson (1997), that educators' voices, and the stories they give rise to, 'should not only be *narrated* but *located*' (p. 113) within their contexts of practice, in ways which ultimately enable educators to 're-write domination' (p. 114). 'Locating' stories means, if one extends Brighenti's (2007) conceptualisation, that researchers must strive to articulate an 'epistemology of seeing' through which the ethnographic and temporal (historical) richness of community, national, and regional circumstances are 'made visible' in their contribution to a grounded understanding of educators' lives and work.

It is worth signalling here the wealth of data that has only rarely been used in studies of educators' lives and work in the Arab region, and which offers new opportunities for research. It includes autobiographies, biographies, novels, personal diaries of activists, politicians, and community leaders, as well as photographs and other records kept in archival collections, international organisations, newspapers, and local communities (see, for example, Endersen

& Øvensen, 1994). These repositories contain primary documents and visual materials regarding how educators in public and private schools, in war torn societies and in refugee camps organised themselves and their students in ways that transcend the immediate circumstances of political and civil upheaval¹¹.

More importantly, however, opening up new spaces hinges on a critical interrogation of dominant conceptual and methodological paradigms through which educators in the Arab region are constructed, and all too easily dismissed, as an inefficient, incompetent and agent-less public, denied a dissenting voice (see, for example, the observation by Berger, 2002, p. 37). Embarking on such an undertaking highlights therefore the challenge for researchers to incorporate in their work communicative and participative methodologies that engage educators and locate their standpoints, voices, and discourses within their multi-faceted contexts of practice, and the conflicts and upheavals within which they act and work (see, for example, Herrera & Torres, 2006; Thomas, 2008). This entails, as Goodson (1997) suggests, ‘develop[ing] stories of action within theories of context ... which act against the kinds of divorce of the discourses which are all too readily imaginable’ (p. 117). Hence, developing a multiplicity of emic¹² languages that capture the contradictory articulations of educators’ lives and work throughout the Arab region emerges as a crucial – and yet to be undertaken – project.

If one wants to attune research on educators’ lives and work with their ‘modes of being’, as an agentic public engaged in a diversity of contradictory locations and fields of power across time and space, then it is crucial to unpack critically the contextual articulations of their practice. This would allow researchers and educators to transcend ‘the forms of apartheid’ (Goodson, 1997, p. 117) that are erected between educators’ stories and the ‘vernaculars of power’ (p. 117) that are used to control educators’ work and subjugate them as a public.

Notes

1. The positional distinctions between ‘school teachers’ and ‘school administrators’ (principals, vice principals, department heads, etc.) are acknowledged. In the present chapter they are referred to as ‘educators’.
2. The United Nations is still in charge of the schooling of Palestinian refugees through UNRWA (United Nations Relief and Works Agency for Palestine Refugees in the Near East). This agency operates schools and welfare programmes in Palestinian refugee camps across the West Bank and Gaza Strip, Lebanon, Syria, and Jordan.
3. The ‘Oslo accords’ are known formally as the Declaration of Principles on Interim Self-Government Arrangements. Signed in September 1993 by the State of Israel and the Palestine Liberation Organization (PLO). They institute the basis upon which the Palestinian Authority – commonly known as the Palestinian National Authority (PNA) – came into being during the following year.

4. What is commonly referred to as the first Palestinian *Intifada* erupted in the Israeli occupied West Bank and Gaza Strip in December 1987 and abated toward the signing of the 'Oslo accords' in 1993. According to Al-Zarou (1988), before the *Intifada*, between 30 October 1968 and 7 April 1988, 30 teachers (of whom five were women) were exiled by the Israeli occupation (p. 306). Between July 1970 and 5 July 1987 (the eve of the first *Intifada*), 17 teachers (of whom five were women and one a university professor) were placed under house arrest (p. 305). During the first six months of the *Intifada* alone (between 27 October 1987 and 6 July 1988), 77 teachers were arrested, of whom three were women (pp. 98-100). Nicolai (2007) further reports that 'as many as 1,600 teachers were removed during the period of the first *intifada*' (p. 97).
5. What is commonly referred to as the second Palestinian *Intifada* erupted in the Israeli occupied West Bank and Gaza Strip following the collapse of the negotiations on a final status agreement between the PLO and the State of Israel in 2000. Nicolai (2007, p. 111) reports that in the period 2000-2005 alone, 27 teachers were killed, 167 detained, and 53 injured.
6. While women in Palestinian schools in Israel and the West Bank and Gaza Strip represent slightly over half of all teachers, their representation is significantly lower in post-primary education (junior high and high schools). In 2007-2008, women represented about 75%, 56%, and 44% of all teachers in primary, junior high, and secondary Arab schools in Israel, respectively (State of Israel, 2008, p. 410). In the PNA's jurisdiction, the percentage of women among all teachers stood at 55.4%, with a significantly lower percentage for the Gaza Strip compared to the West Bank. In private (mainly church) schools, the percentage of women reached almost 73% (Palestinian National Authority, 2008, p. 304).
7. Deng (2006), a senior SPLM education official, writes that according to UNESCO, '[m]ost schools opened during the current civil war in southern Sudan are 'bush schools' with outdoor classrooms and only 12 per cent of the classrooms are permanent buildings made of bricks or concrete ... [T]he number of schools with concrete buildings was only less than 200 schools compared with 800 primary schools that were permanent buildings during pre-war periods. This clearly shows the considerable destruction inflicted on schools facilities and structure during the current civil war' (p. 11). ... 'While about 70 and 46 per cent of the primary schools in southern Sudan do not respectively have latrines and [a] source of safe drinking water such [as] a borehole or well, about 57 per cent of schools do not have health facilities nearby' (p. 12). A Joint Assessment Mission (2005) report states that in 'South Sudan 38% of classes are taught outdoors and 51% in local materials structures in variable states of repair' (p. 9).
8. A Joint Assessment Mission (2005) report in the field of education notes that most teachers are paid 'at rates averaging \$2-90 per annum. Teacher commitment is variable and this is reflected in absenteeism and shortening of the academic year' (p. 9). NGO stands for 'non-governmental organisation'.
9. Moreover, the authors' discussion of the critique of the ISLLC is perfunctory. It disregards sustained critiques that have been raised about the standards in the US (see, for example, Anderson, 2001).
10. Refer, for example, to the arguments debated by Richardson (2004) and Clarke & Otaky (2006) regarding the cultural underpinnings of reflectivity in relation to the education of teachers in the Gulf Arab societies.
11. For instance, a study undertaken by Bashkin (2007), and which focuses on Iraqi schools during the interwar period, aptly illustrates the multiple ways through which these primary and secondary sources can be used to explore teachers' engagement during political upheaval. By using a wide array of 'newspaper articles, novels, and short stories' (p. 41), Bashkin shows how the competing claims to jurisdiction, legitimacy, and authority played out between senior state officials and the vehement opposition levelled by Iraqi intellectuals and educators during the formative stages of the formation of the Iraqi state. The study also shows how in many instances educators and school administrators introduced into their classrooms alternative (though short-lived) textual materials

to those mandated by the state. Bashkin also shows that while ‘the state suffered from tribal revolts and ethnic tensions’ (p. 42) during the formative period of its consolidation, educators played a central role in mediating competing political agendas, curtailing the impact of state policies and promoting alternative political and ideological platforms.

12. Thomas (2007) points out that ‘[e]mic approaches examine behaviours within one culture that cannot be transferred to others as concepts are defined differently and, therefore, cannot be commonly measured or claimed to be universal’ (p. 220).

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CHAPTER 5

Global Discourses and Educational Reform in Egypt: The Case of Active-Learning Pedagogies¹

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Educational reform is shaped by the ideas and actions of national actors but also by global (ideological, political, and economic) dynamics. This chapter offers an analysis of the global discourses (words and practices) that helped to place notions of student-centred and active-learning pedagogies on the international education reform agenda, particularly since 1990. Additionally, the chapter examines how these discourses interacted with educational reform initiatives in Egypt that were undertaken by Egyptian officials and educators, at times with project support from international intergovernmental and nongovernmental organisations. The chapter concludes that comparative and international educators need to interrogate the variety of educational discourses operating at both the local/national and global levels, to examine the complex interactions that occur within and across these levels, and to analyse how such discourses are constrained or enabled by global political and economic developments, including the ideologies and practices of 'democratisation' and multinational corporate capitalism.

Introduction

In recent years comparative educators and other social scientists have engaged in extensive debates about 'globalisation' (Burbules & Torres, 2000; Stromquist & Monkman, 2000; Carnoy & Rhoten, 2002). And while world-system or global-level dynamics are by no means new phenomena, these debates have helped to call attention to the ways in which *economic, political, and cultural* features of a given society – including *educational reform* – can be understood as being shaped by global as well as national and local processes (Ginsburg, 1991; Daun, 2002).

Some have argued that globalisation represents an *imposition* on nation states and their citizens by dominant countries and elites who control the workings of international financial, trade and other organisations, thus reducing citizens' capacity to determine educational and other social policies and practices (Arnové, 1980; Berman, 1992; Brown & Lauder, 1996; Ismael, 1999; Tabb, 2001). Others

have characterised the processes that have led to convergence of educational policies and practices in terms of local and national actors voluntarily *borrowing* or *adapting* 'good', though foreign, ideas to which they have been exposed, including other countries' offers to *lend* such policies and practices (Meyer & Hannan, 1979; Inkeles & Sirowy, 1984; Steiner-Khamsi, 2004). There are at least three limitations to the way the issues are framed above. First, the global discourses (statements and practices), which could be imposed or borrowed, contain important contradictions, as is the case with other ideologies and practices. This not only means that the global discourses can be 'read' differently at different times, in different places, by different people, but also that these ideas and practices may lead to different outcomes.

Second, these portraits either diminish the role of nation-states or treat states as relatively autonomous, rational-choice actors. While viewing the state as autonomous is fraught with theoretical and political problems (see Dale, 1989; Willinsky, 2002), we should note that even semi-peripheral and peripheral nation-states within the world system (Hopkins & Wallerstein, 1979) have some influence on global dynamics and have some capacity to filter, if not deflect, the penetration of global discourses (e.g., see Berman, 1992, p. 59).

Third, these portraits relegate to the shadows the full range of national and international actors. For example, Robertson, Bonal & Dale (2002, p. 472) argue that 'globalization is the outcome of processes that involve real [global organization] actors... with real interests' and Suarez (2007, p. 7) indicates how intergovernmental organisations (IGOs) and international nongovernmental organisations (INGOs) serve as 'receptor sites for transnational ideas ... promot[ing] and diffuse[ing] new ideas in education' (see also Terano & Ginsburg, 2008). Thus, we should note that various intergovernmental organisations, whether bilateral or multilateral, may have different interests and assumptions, and thus the global reform agendas that these organisations seek to promote may not always be the same or, if similar, may not be pursued in ways that reinforce each other.

In this chapter we offer an analysis – based on a review of published scholarship as well as documents published by multilateral organisations (i.e., UNDP, UNESCO, UNICEF, World Bank), bilateral agencies (US Agency for International Development), and international NGOs (e.g., Academy for Educational Development, Aguirre International, American Institutes for Research, CARE) – of the global discourses on the reform of teaching, with particular attention to ideas/practices of active-learning pedagogies. In addition, in order to better understand how such discourses inform and are informed by a range of national-level actors, we focus our lens also on discourses of the government of Egypt, which is one of the nine most populous countries in the

world, has one of the largest education systems (UNESCO, 2006), and plays a central strategic role 'in determining the stability of the Middle East and southern Mediterranean area' (Sayed, 2005, p. 67).

Discourses of the community of scholars

'Active-learning' (or 'student-centred') pedagogies represent a model of teaching that highlights 'minimal teacher lecturing or direct transmission of factual knowledge, multiple small group activities that engage students in discovery learning or problem solving, and frequent student questions and discussion' (Leu & Price-Rom, 2006, p. 19; on student-centred instruction, see Cuban, 1984, pp. 3-4). 'Active-learning' pedagogies can be contrasted with 'formal' or 'direct instruction' approaches emphasising teacher lecturing or direct transmission of factual knowledge, coupled with 'recitation and drill' (Spring, 2006, p. 6)³. Thus, there are both behavioural and cognitive dimensions on which active-learning, student-centred pedagogies can be contrasted with formal or direct instruction (see Mayer, 2004; Ginsburg, 2006; Barrow et al., 2007). The behavioural dimension of active-learning pedagogies focuses on the degree to which instructional practices enable students to engage in verbal or physical behaviour, while the cognitive dimension highlights the degree to which teaching strategies enable students to engage in various forms/levels of thinking. Thus, we can identify different theoretical and philosophical notions that have contributed to how the differences between these pedagogies are framed.

The *behavioural dimension* is perhaps most frequently traced to American philosopher/educator, John Dewey (1859-1952), who developed a pragmatist philosophy, popularised 'progressive' or 'experiential' education, and promoted learning by experimentation and practice, learning by doing (e.g., Dewey, 1938). However, one can also trace a concern for (especially verbal) behaviour in learning to: (i) Confucius (551-479 BC), who argued for 'individualized instruction through discussion'; (ii) Socrates (470-399 BC), who emphasised involving individual learners 'in a philosophic dialogues'; (iii) Johann Heinrich Pestalozzi (1746-1827), who encouraged 'firsthand experience in learning environments'; and (iv) Friedrich Froebel (1782-1852), who argued for learning via 'free self-activity ... [which] allows for active creativity and social participation' (Treat et al., 2008). Furthermore, we should note the more recent theoretical contribution of scholars and educators associated with the Humanist Movement, for example, Carl Rogers (1969, p. 162), who argued that 'much significant learning is acquired by doing' and that 'learning is facilitated when the student is a responsible participant'.

The *cognitive dimension* is generally traced to the work of the French psychologist, Jean Piaget (1896-1980), who ‘suggested that, through processes of accommodation and assimilation, individuals construct new knowledge from their experiences’ (Wikipedia, 2008, para. 1). Another source of influence is the work of Lev Vygotsky (1896-1934), whose writings focused on ‘the relationship between language and thinking’ as well as ‘the roles of historical, cultural, and social factors in cognition’ (Wikipedia, 2008, para. 3). Moreover, although Qur’anic schools have tended to emphasise rote learning and memorisation (Boyle, 2006; Spring 2006), alternative pedagogical traditions associated with Islamic scholars stress students’ active cognitive role in learning. For example, Al-Jahiz (776-868) promoted using ‘deductive reasoning’ as well as ‘memorization’ and Abu Nasr al-Farabi (870-950) encouraged ‘instruction ... that ... ensures that both teacher and student participate actively in the process ..., allow[ing] the instruction to be student-centered’ (Günther, 2006, pp. 375-76). Finally, a more contemporary cognitive psychologist of education, Merl Wittrock (1979), explains that ‘learners have active roles in ... learning. They are not passive consumers of information ... Even when learners are given the information they are to learn, they still must discover meaning’ (p. 10).

Discourses of international organisations

Beeby’s (1966) book, *The Quality of Education in Developing Countries*, was ‘widely influential’ internationally ‘in the late 1960s and early 1970s’ in efforts ‘to improve the quality of teaching by changing teaching styles ... toward liberal, student-centered methods’ (Guthrie, 1990, pp. 220-21). And in a chapter in *The Quality of Education and Economic Development: A World Bank Symposium* (Heyneman & White, 1986) Beeby restated his earlier argument that as education systems (particularly primary schools) progress toward higher stages of development ‘teaching becomes less rigid, narrow, and stereotyped and less dependent on mass methods of instruction and rote memorization’ (Beeby, 1986, p. 39). In the introduction to this volume, based on a symposium organised by the World Bank in May 1983, Heyneman (1986) explains:

‘Previously most educational loans from the World Bank were directed at expanding educational systems by building more schools, hiring more teachers, and providing access for more students. ... [Now the focus is on quality. And,] although classroom pedagogical style may be locally determined, the ingredients required to make classrooms function properly are not.’ (p. 3)

The late 1980s, the 1990s and the 2000s witnessed an explosion of international research reports and policy documents focusing on reforming teachers' behaviour toward active-learning pedagogies. Perhaps one of the most internationally visible policy statements was the document ratified by the World Conference on Education for All (EFA): Meeting Basic Learning Needs, jointly organised by UNDP, UNESCO, UNICEF and the World Bank, in Jomtien, Thailand, 5-9 March 1990. The *World Declaration on Education for All* states that 'active and participatory [instructional] approaches are particularly valuable in assuring learning acquisition and allowing learners to reach their fullest potential' (Inter-Agency Commission, 1990, Article 4).

In the following year, the World Bank published a research-based policy report (Lockheed & Levin, 1991), in which the editors conclude

'by summarizing the areas of accord [across cases in book] as a basis for considering generic approaches to developing schools that will become more effective ... The emphasis on student learning is to shift from a more traditional passive approach in which all knowledge is imparted from teachers and textbooks to an active approach in which the student is responsible for learning.' (pp. 15-16)

UNICEF helped to channel this global pedagogical discourse into Egypt, when in cooperation with the Egyptian Ministry of Education (MOE) and the Canadian International Development Agency it launched the Community School project in 1992. As a key UNICEF staff member (Zaalouk, 2004) later recounted, the 'community-school education model in Egypt was established during the period following the [1990] *Jomtien Education for All* (EFA) world conference' (p. 31):

'The contract signed [with the MOE] stipulated that ... community schools would provide innovative pedagogies for quality education [especially for girls] that would focus on active learning, acquisition of life skills, values-based learning (with an emphasis on practicing rights), and brain-based learning that would awaken all the child's intelligences, including his or her spiritual and emotional ones.' (Zaalouk, 2004, p. xi)⁴

Moreover, UNESCO and UNDP helped to diffuse the discourse on pedagogical reform by funding an assessment of educational reform efforts in Egypt between 1991 and 1996. The authors of that report, which was widely and prominently circulated in Egypt, state that:

'By all standards, the initial phase of the basic education reform in Egypt (1991-1996) has been successful. ... [However,] a number of capacity-building initiatives are needed to strengthen the reform in the following

areas: (1) teacher education, both in-service and pre-service, so as to broaden the teachers' capacities to deliver the new curriculum and [interactive instructional] methods.' (Spaulding et al., 1996; cited in MOE, 2002, pp. 169-71)

The World Bank also helped this pedagogical discourse to travel to Egypt, when in cooperation with the Egyptian Ministry of Education and the European Union it initiated the Education Enhancement Programme in 1996. According to the *Project Information Document* (World Bank, 1996), this project sought to 'significantly increase students' achievement of basic skills and help improve their critical thinking skills' (p. 2). This would be accomplished by 'improving the quality of teaching and learning' (p. 2) and introducing educators to 'new methods of teaching' (p. 8). While this brief document is somewhat ambiguous about how teaching quality and new teaching methods were conceived, the programme evaluation conducted a decade later clarifies a preference for active-learning, student-centred versus formal transmission, and teacher-centred instruction approaches. Variables studied included:

- *Educational Techniques* to meet the needs of low achievers ..., for example, giving them a large number of questions ...
- *Frontal Teaching* represents the time the teacher, on average, spends on frontal teaching.
- *Group work* represents the time the teacher, on average, spends on group work. ...
- *Teacher classroom management* refers to ... giving pupils the opportunity to express their opinions, distributing roles and responsibilities among pupils, encouraging pupils to depend on themselves ...
- *Learning strategies* ... refers to the extent to which teachers divide pupils into 'cooperative working' subgroups, take into consideration to develop pupils' critical thinking, train pupils in problem solving ...' (Programme and Project Monitoring Unit [PPMU], 2006, pp. 48-49)

The US Agency for International Development also began to promote pedagogical reform toward active-learning methods in the mid-1990s. For instance, the 'amplified description' of a proposed (but not implemented) Strategic Objective Agreement between the Arab Republic of Egypt and the United States of America for Girls' Education states: "The Parties to this agreement will advance this process [by training] ... teachers to apply the interactive teaching methodologies and encourage problem solving by learners. ... Technical assistance will support the development of ... [teachers] using student-centered methodologies and emphasizing problem-solving and analytic skills' (USAID/Egypt, 1996, p. 10).

Ten years after the World Conference on Education for All, UNDP, UNESCO, UNICEF and the World Bank co-sponsored a meeting in Dakar, Senegal, attended by representatives from most governments from around the world, including Egypt. The 'Dakar Framework' from this 2000 meeting reiterates an international policy commitment to active-learning pedagogies: 'Governments and all other EFA partners must work together to ensure basic education of quality for all, regardless of gender, wealth, location, language or ethnic origin. Successful education programmes require [among other things:] ... well-trained teachers and active-learning techniques' (UNESCO, 2000, p. 17).

In the same year USAID/Egypt initiated the New Schools Programme (NSP), which in many respects mirrored the ideas contained in the (non-implemented) Strategic Objective for Basic Education grant. Based on USAID/Egypt's request for proposals, CARE, the Education Development Centre, World Education and several local NGOs submitted the following as part of their NSP proposal, in reference to one of the expected intermediate results – 'Improved Teaching and Learning Practices in USAID-Supported Schools: The CARE Team will develop an effective training program for teachers and school officials ... in single-grade NSP schools, ... *emphasiz[ing] active, child-centered learning methodologies that help students develop strong problem-solving skills*' (CARE et al., 1999, p. 16). Such reform pedagogies were also mentioned in the mid-term evaluation of NSP (Aguirre International, 2003): 'To meet its goal of improving educational quality', the New Schools Programme provided 'teachers with support for trying new ideas, ... [including:] cooperative learning, some forms of active learning' (p. x) and for 'changing ... their teaching practice from traditional, rote learning to one in which children are working together, participating actively in their own learning' (p. 18).

And in March 2001, USAID/Egypt (2001) committed to supporting the Alexandria Education Reform Pilot Project designed to 'improve the quality of education in the Governorate of Alexandria ... through [among other things] ... enhanced training of teachers and school administrators' (p. 1). The Concept Paper for this project observed that 'most teachers ... over-emphasize the skill of memorization. ... [and need to be] trained for using alternative methods encouraging student interaction' (pp. 4-5). In the Status Report on the Alexandria Pilot, which was distributed half way through the second school year of the project, USAID/Egypt (2002, p. 8) calls positive attention to the training courses provided for teachers, including: Effective Teaching Methods, Student-Centred Methods, Advanced Student-Centred Training – (conducted in the) US, and Supervising Student-Centred Classes.

Also in 2002, in preparation for requesting proposals for the Education Reform Programme (see Academy for Educational Development et al., 2004; American

Institutes for Research et al., 2004), USAID/Egypt commissioned a study. The study report sketched a number of cross-cutting themes, including: 'Classroom Learning Environment. ... Egyptian public schools ... emphasize memorization and rote learning of the exam-driven curriculum. ... There is little ... [use of] new methodologies that encourage and enable students to become active, enthusiastic participants in their own learning' (Aguirre International, 2002, pp. 11-12).

USAID/Egypt's growing and increasingly explicit enthusiasm for active-learning pedagogies is evident in its September 2003 Programme Descriptions used to request applications for ERP: 'Quality improvements are required to ensure that universal enrollment is accompanied by the acquisition of critical-thinking skills. ... Extensive training is required for tens of thousands of Egyptian educators to adopt modern methodologies and promote active learning' (USAID/Egypt, 2003a, p. 4; USAID/Egypt, 2003b, p. 7). Furthermore, USAID/Egypt (2003a, pp. 19-20) specified two of the sub-intermediate results expected to be achieved by the Classrooms and Schools component ERP: (2.4) 'teachers receive pre-service education and in-service training in learner-focused teaching and assessment methods' and (3.1) 'students engage in participatory learning, critical thinking and problem-solving'.

Then, in 2005, USAID (2005) published its global *Education Strategy*, which argued that '[i]mproving instruction is a complex task that entails a wide range of interventions. ... supporting improved teacher training ... [toward] adoption of *teaching* methods that involve students in the learning process' (p. 9). That same year, USAID/Egypt agreed to extend the New Schools Programme through 2008. In its application for the extension, reflecting its perception of USAID/Egypt's priorities, CARE (2005) highlighted that: (a) 'over 1,500 teachers and facilitators are using active, student-centered learning methodologies as a result of their training with NSP' (p. 5) and (b) 'active learning methods ... create a dynamic, interactive environment in which girls and boys have a voice and an opportunity for hands-on educational activities' (p. 9).

Also, in 2005, USAID/Egypt commissioned an evaluation of the Alexandria Pilot Project, which focused in part on the goal of improving teaching and learning. The evaluation report mentions:

'[T]he introduction of new teaching-learning methods to the schools most directly addresses educational quality. The central premise is that students optimize their acquisition, mastery, and retention of new skills when they are actively involved in their acquisition. ... Most pilot-school teachers understand at least the fundamental nature of active-learner pedagogy. ... Although classroom observation was not possible, evidence suggests that pilot-school teachers have introduced interactive methods into their classrooms to a modest extent.' (Tietjen et al., 2005, p. vii)

More recently, in 2007, in its Request for Proposals for a new initiative, entitled *Girls Improved Learning Outcomes*, USAID/Egypt (2007) observed that ‘ineffective instructional methods and other dimensions of school quality also limit the capacity of the school system to prepare students, particularly girls, with basic skills needed for a modernizing society’ (p. 6), and then outlined the purpose of one of the components of the project, ‘improving the quality of teaching and learning: ... to support the implementation of a standards-based model for quality education in targeted schools and communities ... [through] a focus on ... active and meaningful student learning and assessment [as well as] ... girl friendly educational materials and pedagogical practices’ (p. 8).

Given the volume – in the sense of amount and loudness – of the multilateral organisation discourse promoting active-learning pedagogies during the previous two decades, we should not be surprised that UNESCO’s (2008) *EFA Global Monitoring Report* concludes that ‘country case studies ... indicate a trend to revise curricula to make classroom interactions more responsive and centred on the child. There is a move away from traditional ‘chalk and talk’ teaching to more discovery-based learning and a greater emphasis on outcomes that are broader than basic recall of facts and information’ (p. 131)⁵.

Egyptian government discourses

When Mohamed Ali assumed political leadership of ‘modern’ Egypt in 1805, he established a secular education system along side the Islamic al-Azhar system, though both systems seem to have been dominated by teacher-centred, knowledge-transmission pedagogies. During Egypt’s period of ‘semi-independence’ (1922-1952), following British colonisation (1882-1922), ‘great [quantitative] advances took place in public education at all levels’ (Cochran, 1986, p. 1; see also Williamson, 1987, p. 107), but there was less progress in achieving quality. For example, Radwan’s (1951; cited in Erlich, 1989) research concluded that ‘teaching in the schools ... consisted mainly of inculcating abstract or factual information, learned by rote in the traditional way’ (p. 97).

Following the 1952 Revolution, the Egyptian government headed by Gamal Abdel Nasser (1954-1970) continued to focus on quantitative growth in schooling, ‘expanding access to education at all levels’ (Williamson, 1987, pp. 118-19), as did Anwar Al-Sadat’s government (1970-1981). However, in September 1979, the Ministry of Education during the Sadat period published *A Working Paper Concerning the Development and Modernization of Education in Egypt*, which focused some attention on quality issues: ‘This paper ... argued that ... [there is] an urgent need to change and update Egyptian education ... [because]: a) curricula

do not prepare students for practical, productive lives; b) rote memorization dominates the learning-teaching situation; ... [and] e) low teacher qualifications' (MOE, 1979; discussed in USAID/Egypt, 1981, p. 5).

And when Mohammed Hosni Mubarak (1981-present) became president, his government initially emphasised quantitative expansion, including extending compulsory education from 6 to 9 years. However, in 1991, at the end of his first decade in office, in the wake of the World Conference on Education for All, and in the context of Egypt negotiating a structural adjustment programme with the World Bank, Mubarak (in a speech before the joint session of the People's Assembly and the Shura Council; see MOE, 1992) called attention to what he termed 'the crisis in education ... Education continues to suffer from a predominant focus on quantity rather than quality' (p. 5). The volume in which his speech was published, *Mubarak and Education* (MOE, 1992), articulated the Egyptian government's conception of improving educational quality:

'Education should, therefore, change from an outdated mode of teaching dependent on memorization and repetition to a new form of instruction, which would include the student as an active participant in the educational experience and an active partner in the learning process. ... Emphasis on rote learning and memorization has produced individuals who are easily programmed and vulnerable ... contributing to the prevalence of many social problems, such as drug dependency, extremism, and fanaticism.'
(p. 43)

Similarly, in its *Implementing Egypt's Educational Reform Strategy*, the Egyptian Ministry of Education (1996) elaborates its conception of educational quality, when discussing education being a 'national security' issue: 'The democratic framework also necessitated that students through all stages of the educational ladder be exposed to different types of learning tools and materials, and taught necessary democratic skills, such as debate, tolerance for other opinions, critical analysis and thinking, and the significance of participating in decision making' (p. 22). And in his book, *Education and the Future*, Hussein Kamel Bahaa El Din (1997), who served as Egypt's Minister of Education from 1991 to 2004, echoes points made earlier by Mubarak when discussing the continuing 'crisis in education': 'It is imperative for us to change from a familiar system that emphasized rote memorization and passive learning to a new system that emphasizes active participation, with the learner a significant partner in the process' (p. 107).

While (as discussed above) multilateral and bilateral organisation discourses can be seen to have been channelled to Egypt through technical assistance projects and evaluation studies, we should also note how Egyptian discourses have been

a part of, and likely informed, such international organisation discourses. For instance, Egyptian President Mubarak spoke at the 2000 Dakar EFA conference, stressing: 'As the ninth decade of the last century witnessed determination that education is for all, the first decade of the twenty-first century must witness, with more determination and insistence, strenuous efforts to achieve a new vision, i.e., *Education for Excellence and Excellence for All*' (see MOE, 2002, p. 67). The phrase 'education for excellence and excellence for all' was repeated in the MOE publication, *Mubarak and Education: Qualitative Development in the National Project of Education* (MOE, 2002), calling this 'a major national target that directs its march according to the criteria of total quality in education' (p. 6). This MOE (2002) publication also identifies the following as two key elements of the 'future vision of education in Egypt': (a) 'Achieving a Learning Community ... Moving forward from a culture of memorization and repetition to [one] of originality and creativity. ... marked by the individual's active role in the teaching/learning process' (p. 140) and (b) 'Revolution in the Concepts and Methods of Education ... The student's role is not that of a *passive receiver*, but of a knowledge-producing researcher' (p. 148).

In 2003, the Ministry of Education published a key document, the *National Standards of Education in Egypt*, following an intensive effort involving many educators. According to the introduction to this document: 'Having succeeded in achieving ... [the objective of 'education for all'], the state is now inspired by the President's vision which is represented in his [1991] call for a qualitative change in education' (MOE, 2003, p. 4). The standards and indicators for the 'educator' domain, entitled 'learning strategies and classroom management', provide evidence of how central active-learning, student-centred pedagogies had become within at least the official Egyptian discourses:

- First Standard: Utilizing educational strategies that meet student needs. [Indicators:] Teacher involves all students in diverse educational experiences suitable to their skills and talents. Uses different strategies to present concepts, introduce skills and explain the subject. Gives students open-ended questions and facilitates discussion to clarify and motivate the student's thinking.
- Second Standard: Facilitating effective learning experiences. [Indicators:] Teacher provides independent and cooperative learning opportunities. Divides students into groups to promote interaction and learning. Encourages positive interaction and cooperation among students.
- Third Standard: Involving students in problem-solving, critical thinking and creativity [Indicators:] Encourages students to apply what they have

learnt in educational and life situations. Encourages students to be inquisitive, have initiative and show creativity. ... Involves students in problem-solving activities and encourages various ways to reach solutions. Encourages students to put forth critical questions. ...

- Fifth Standard: Effective utilization of motivation methods. [Indicators:] Creates a favorable educational and learning climate to encourage classroom interaction ...' (MOE, 2003, pp. 75-76)

During his relatively brief period as Minister of Education, Ahmed Gamal Eddin Moussa (July 2004-December 2005) downplayed somewhat the role of standards, though the Ministry and the Egyptian government more generally maintained a clear focus on improving educational quality and active-learning. For instance, in its September 2004 publication, *Reforming Pre-University Education Programs*, the Ministry outlines the latest plans for reform, which included as two of its five main pillars for reform: 'assuring education quality' and 'training and improving teachers' conditions' (MOE, 2004; cited in El Baradei & El Baradei, 2004, p. 5). Moreover, the Minister of Education articulated the following during a newspaper interview: '[More important than] having thick books [and] a huge number of courses ... is that students interact with what they are learning in order to simply gain knowledge and acquire useful skills. ... Quality is more important than quantity, and if we have a lot of schools without qualified teachers or proper equipment, then we haven't solved anything' (Moussa, 2005).

Soon after Yosri Saber Husien El-Gamal was appointed Minister of Education in December 2005, he stated in an interview: 'The third pillar is professional development – focusing on raising teachers capabilities ... [including using] modern educational methods ... The second challenge is about the quality of education ... based on national standards. ... [and focused on] ... develop[ing] students' mental skills and creativity' (El-Gamal, 2006). The Minister also mentioned similar points, while highlighting teachers' use of student-centred and active-learning teaching methodologies as well as students' engagement in critical thinking and problem solving, during a presentation made in March related to the Ministry's strategic planning initiative:

- The Educational Vision is built upon sector-wide, total quality approach, based on six main domains: 1) Effective School, providing quality education for every learner, in an untraditional student-centered environment, using technology and active-learning methodologies to enable the student acquiring self learning, problem-solving, critical thinking and life skills. ... 3) Curricula that are relevant, based on active learning, [and] support critical thinking [and] problem solving ...' (MOE, 2006, slides 6-7)

- Strategic Directions: 2. Quality: ... a) opportunities for on-going training and professional development ... [and] d) curriculum and teaching will be diverted from rote-learning mode to active learning, building the knowledge base of the learner and enhancement of higher skills.’ (MOE, 2006, slides 15-16)

MOE’s *Strategic Plan* (2007, Part IV, Chapter 2) continued to stress the importance of active-learning pedagogies: (a) ‘there are 4 key factors that contribute to educational quality in what and how students are taught: standards-based content, integration of IT, integration of assessment, and adopting an active learning methodology’ (p. 1); (b) ‘the ... curriculum documents/frameworks [should] ... reflect the move away from a traditional rote memorization approach with a strong focus on content to one that is focused on application of skills and critical thinking and problem solving’ (p. 4); and (c) ‘to insure effective implementation of the new curricula and instructional materials, teacher professional development programs in the area of student-centered, active-learning methodology and assessment are essential elements’ (p. 7).

Finally, in 2007 Egypt’s National Centre for Educational Research and Development (NCERD, 2007) published a *Mid-Term EFA Evaluation*, reporting on progress in achieving the goals set out in Egypt’s *National Plan for Education for All, 2002/2003-2015/2016* (NCERD et al., 2004). The report summarises the qualitative shift in which the Egyptian government in engaged, including a focus on active learning: ‘The MOE works on achieving a qualitative shift in education, and improving the quality of the educational process through the following efforts: ... (2) moving from achieving quantity to quality aspects in education; (3) ensuring excellence for all and achieving total quality education through students’ active involvement in the educational process ...; [and] (4) promoting teachers’ professional development and improving teaching methods’ (NCERD, 2007, p. xi).

Conclusion

In this chapter we sought to illuminate how the global and national/local interact with respect to educational reform. Our focus was on the discourses of multilateral organisations (UNDP, UNESCO, UNICEF and World Bank), bilateral agencies (viz., USAID), international NGOs (e.g., Academy for Educational Development, Aguirre International, American Institutes for Research, CARE), and the Egyptian government with respect to promoting active-learning, student-centred pedagogies as a key element of improving educational quality.

While our focus here is on reform rhetoric, readers may also be interested in whether such rhetoric corresponds to classroom practices. That is, to what extent have active-learning teaching methods been fostered through professional development activities and to what extent have Egyptian teachers implemented this pedagogical reform? There is, indeed, evidence that within the context of pilot projects teachers acquired the commitment and competence to at least move along the continuum from teacher-centred and transmission/memorisation-oriented to student-centred and active-learning pedagogical approaches. This is the case, for example, for the Community School Programme in Egypt (1992-2004) supported by UNICEF and the Canadian Development Agency (see Zaalouk, 2004), as well as for three USAID-supported projects in Egypt: (a) the New School Programme (2000-2007) (see Aguirre International, 2003); (b) the Alexandria Pilot Project (2002-2004) (see Tietjen et al., 2005); and (c) the Education Reform Programme (2004-2009) (see Ginsburg et al., 2008; Megahed et al., 2009). However, reformed teacher behaviour appears not to have been generalised either by 2002 or by 2007⁶:

'Egyptian public schools ... emphasize memorization and rote learning ... [and] there is little ... [use of] new methodologies that encourage and enable students to become active, enthusiastic participants in their own learning.' (Aguirre International, 2002, pp. 11-12)

'[D]espite ... effective implementation of components targeting changes on factors of the teaching-learning process in Egyptian schools, there is not much evidence of ... impact on pedagogical practices.' (World Bank, 2007, p. 47)

With respect to the relative strength of influence of local/national versus global actors, Sayed (2006) argues, for example, that

'the reform initiatives had already been conceived internally within Egyptian government schemes ... before the launch of the Jomtien Education for All Campaign in 1990. The MOE assimilation of the EFA goals allowed it to jump on a moving wagon ... [and] secure funding for education projects.' (p. 148)

We believe that this represents only part of the picture. The report of discourses presented above reflects neither a simple dynamic of national/local actors making unfettered choices in a free market of ideas nor a simple process of international actors imposing ideas on unwilling national/local actors. The complex dialectic between the global and local (see Arnove & Torres, 1999) may be seen from the

following statements by the Egyptian government. First, reflecting a more voluntary choice perspective, the MOE (2002) identifies what it terms *its* own objectives in the field of international cooperation and partnership:

- ‘1. To benefit from world experiences and international co-operation that Egypt has approached through openness to different cultures.
2. To set up new partnerships with the international organizations concerned with education (e.g., UNESCO, UNICEF, the World Bank, European Union, USAID, CIDA, Japanese Aid, Finnish Aid, and some others).
3. To get foreign aid and international expertise to participate in carrying out different education projects.
4. To develop education cadres capable of coping with international developments.
5. To get acquainted with international standards that help to achieve quality education.’ (p. 128)

Second, portraying an external-influence perspective, Egypt’s National Centre for Educational Research and Development (NCERD et al., 2004, p. 30) states that the ‘National Plan for EFA, 2002-2016’ was informed by ‘the goals of ‘Education for All’ as approved by the International Forum on Education (Dakar, April 2000)’ – an ‘external’ international document, though developed during a meeting attended and perhaps influenced by Egyptian government representatives. At the same time NCERD et al. (2004) mention the following, which might seem to be internal sources, but in fact were often produced with international technical assistance:

- ‘a. The National Plan for Social and Economic Development (2002-2007) in Egypt.
- b. The Ministry of Education’s five-year plan (2002-2007).
- c. The Program of National Modernization – Egypt in the 21st Century – education as the base for human development and future modernization (2002-2012).
- d. Structural modeling of a national plan for ‘Education for All’ ...’ (p. 30)

In addition, in this chapter we outlined some of the global discourses of the community of scholars focused on active-learning, student-centred pedagogies versus more formal teacher-centred, transmission-oriented instructional approaches. Whether focusing on the behavioural or the cognitive dimension to distinguish these teaching methods, these discourses can be traced back at least to the beginning of the 20th century (e.g., John Dewey, Jean Piaget), but appeared much earlier in Asia (Confucius: 6th-5th century BC), Europe (Socrates: 5th century

BC), and the Islamic world (Abu Nasr al-Farabi, 9th century AD). Thus, it should be clear that the ideas were available – and, at least to an extent, circulating – long before they punctuated the discourses of either:

- a. international organisations (first identified in the mid-1980s, but increasingly more audible beginning in the early 1990s); or
- b. the Egyptian government (first catalogued in the late 1970s, but increasingly visible beginning in the early 1990s).

Finally, our examination of global and national discourses of active learning invites further research to explore why the volume of active-learning pedagogical reform discourses (rhetoric and actions) increased when it did. Although it is important to analyse the theoretical and research discourses through which this was accomplished, here we point to political and economic developments that may have not only facilitated such discourses but also enabled active-learning pedagogies to become increasingly taken for granted as part of notions of educational quality. According to the World Bank's (1999, pp. 1-2) *Education Sector Strategy*, two of the 'five drivers of change' in the field of education are (a) 'global democratization and the growth of a powerful civil society which requires education for citizen participation' and (b) 'globalization of markets resulting in employers pursuing the best and least expensive workers by shifting their operations from country to country' (see also Spring, 2004, pp. 45-46).

With regard to *global democratisation*, Spring (2006) has argued that '[f]ormalistic forms of education are often used to prepare students to accept and fit into existing ... systems ... [while p]rogressive forms of education are considered a means for preparing students to actively influence the direction of ... political and social systems' (pp. 6-7). Thus, *at least at a rhetorical level*, there may be a link between promoting active-learning pedagogies and supporting political democratisation. Interestingly, however, while the Egyptian Ministry of Education argued the connection between pedagogical and political reform in the mid-1990s – 'the democratic framework also necessitate[s] that students ... be ... taught necessary democratic skills, such as debate, ... critical analysis and thinking and ... participating in decision making' (MOE, 1996, p. 22) – we did not detect this argument explicitly within the educational reform discourses of international organisations during the time period we investigated. Moreover, we need to be cautious in accepting uncritically the idea that real democratisation – as opposed to the ideology of democracy – is spreading around the world (see Diamond & Plattner, 1993). We also need to consider that although the 'Egyptian state has formally recognized the importance of and need for democratization ever since the 1972s, ... the state approaches democratization with prudence, ...

particularly since national security and political stability are ‘endangered’ by fundamentalist terrorist movements and external conspiracies’ (Sayed, 2006, p. 79)⁷. Thus, in his critical analysis of reforms promoting ‘democracy of learning’ in Egypt, Badran (2008) observes that one meaning of this phrase is ‘giving the students a great deal of freedom and responsibilities’ for learning, but notes that such ‘efforts ... to improve ... the educational system ... will be fruitless unless they occur in ... a context where the spirit of democracy prevails ... [in] the social and political relations taking place outside the school’ (pp. 6, 9; see also Hargreaves, 1997).

In terms of *globalisation of the economy*, Carnoy (1999) notes that the goal of ‘competitiveness-driven reforms’ (in contrast to ‘finance-driven reforms’ and ‘equity-driven reforms’) are

‘primarily to improve economic productivity by improving the ‘quality’ of labour. In practice, this philosophy translates into expanding the average level of educational attainment among young workers and improving the ‘quality’ at each level – where quality is measured mainly by student achievement, but also by education’s relevance to a changing world of work.’ (p. 137)

This, of course, could lead to a privileging of formal, teacher transmission-oriented pedagogies. However, as Mattson (2008) comments in relation to higher education in the US: ‘Increasingly, justifications of active learning seem less interested in questions of democracy and active citizenship ... than in the ‘new’ realities of the American economy. Active learning is necessary because employers need people who can retool quickly’ (para. 6). And clearly the international and national documents reviewed above often articulated at least an implicit link between pedagogical reform and economic development, in that the rationale behind improving educational quality was framed in relation to international competitiveness. This link is made even more explicitly in the following excerpt from a volume entitled *Strengthening Education in the Muslim World*:

‘The teacher-focused learning and authoritarian teaching styles that prevail in most Egyptian classrooms promote passive learning. ... It is clear that Egypt will need a more sophisticated education system that *produces students with critical thinking skills and the ability to enter the competitive job market.*’ (USAID, 2004, p. 11; emphasis added)⁸

But why did the discourses favouring active-learning pedagogies reach such a crescendo beginning in the 1990s? While technological developments like the ‘information revolution’ (World Bank, 1999) certainly reshaped the world economic system, we need to consider as a major contributing factor the

restructuring of the global political economy that resulted from the ‘revolutions’ in Eastern Europe in 1989 and the ‘collapse’ of the Soviet Union in 1991. The move from a bi-polar world (plus non-aligned nations) to basically a uni-polar world (though with important divisions in terms of wealth and religious/ideological dimensions) has enabled the rise of at least the ideologies of ‘democracy’ and the ascendance of multinational corporatist capitalism.

Notes

1. Revised and abridged version of keynote presentation at the Mediterranean Society of Comparative Education (MESCE) conference, Malta, 11-13 May 2008. The research on which this article is based was undertaken, in part, in relation to work funded through the Educational Quality Improvement Project (EQUIP1) Leader Award and the Egypt Education Reform Programme (ERP).
2. Both authors have been involved with the USAID-funded Education Reform Programme (ERP), one of the international organisation-supported projects discussed in this chapter. Mark Ginsburg initially served as director of the Faculties of Education Reform division of ERP (2004-2006), and subsequently contributed short-term technical assistance for ‘documentation for reform diffusion’ activity of ERP’s Monitoring and Evaluation division, while based at the Academy for Educational Development in Washington, DC (2006-2008). Nagwa Megahed served as programme specialist for Action and Decision-Oriented Research within ERP’s Faculties of Education Reform division (2004-2006), and subsequently worked as a senior technical advisor in ERP’s Monitoring and Evaluation division (2006-2008). The research reported in this article represents an extension of a documentation study of ERP-supported reform in the area of professional development (see Megahed & Ginsburg, 2008). The article also builds on the research undertaken as part of the Leader Award for USAID’s (global) Educational Quality Improvement Programme (EQUIP1) (see Ginsburg et al., 2008; Megahed et al., 2009).
3. Guthrie (1990) notes that ‘the schools of lesser-developed countries are littered with remnants of attempts to change the quality of teaching. ... [based on] Western philosophies of education that denigrate the formalistic teaching’ (p. 219); ‘while many modern educationalists do not approve of formalism, it is desirable and effective in many educational and cultural contexts’ (p. 228). Furthermore, noting the paradox that rote learning tends to be more dominant in Asian than Western schools, but students in Asian countries tend to outperform their Western country peers on international achievement tests, Watkins (2007, p. 309) calls our attention to ‘cultural differences in the perception of the relationship between memorizing and understanding’, commenting that Asian students ‘frequently learn repetitively, both to ensure retention *and* to enhance understanding’.
4. Approximately ten years after this UNICEF- and CIDA-supported project was launched, the author of a UNDP and UNESCO reform assessment mission in Egypt recognised favourably the ‘innovative models of institutions, such as One-Classroom Schools and Community Schools ... [which have] introduce[d] appropriate learning materials and teaching practices for multi-grade teaching’ (Spaulding, Manzoor & Ghada, 2003, p. 12).
5. The *EFA Global Monitoring Report* mentions that the People’s Republic of China ‘introduced a new curriculum in 1999, focusing on active learning ... It was in place across the country in primary and junior middle schools by 2005’ (UNESCO, 2008, p. 131). Interestingly, China adopted such progressive pedagogies as government policy in 1999, apparently as a result of

- World Bank (as well as UNDP, UNICEF, and UNESCO) discourses, but in the 1920s, before the rise and fall of the Mao-led communist revolution, 'John Dewey introduce[d] progressive education ideas that had a major impact on Chinese educational theory' (Spring, 2006, p. 7).
6. In fact, part of the basis for assessing the impact of professional development activities undertaken within the context of the Education Reform Programme (ERP) was to observe systematically that teachers involved in the programme exhibited a higher degree of reform pedagogies than those in the same governorates who had not participated in ERP-supported activities (see Abd-El-Khalick, 2006, 2007).
 7. Sayed (2006) explores in more detail how the Egyptian government and international organisations (bilateral and multilateral intergovernmental as well as nongovernmental) have faced and tried to deal with 'conspiracy' – whether theories or realities – in relation to foreign assistance in education and other sectors. For example, international projects focused on developing 'the 'international orientation of the curriculum' is the element that is most contested and gives weight to conspiracy theory arguments' (Sayed, 2006, p. 110). However, pedagogical reform does not seem to have been caught up in the politics of conspiracy, perhaps, as discussed below, because economic development (versus democratisation) was emphasised by international organisations and the Egyptian government in its discourses about active-learning pedagogies.
 8. Reinforcing the point that international organisation discourses focused on economic (versus political/democratic) benefits of pedagogical reform, a subsection of this USAID document devoted to 'civic participation' actually highlights the economic dimension, quoting the *Arab Human Development Report* (UNDP, 2002): 'The most worrying aspect ... is education's inability to provide the requirements for the development of Arab societies. ... If the steady deterioration in the quality of education in the Arab countries ... [is] not reversed, the consequences for human and economic development will be grave' (cited in USAID, 2004, p. 12).
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CHAPTER 6

The Permanence of Distinctiveness: Performances and Changing Schooling Governance in the Southern European Welfare States

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This chapter analyses the performance and the emerging forms of governance of schooling in the countries of the southern model of welfare state (Ferrera, 1996, 2000). Four countries – Spain, Portugal, Greece and Italy – will be analysed in the context of the ‘lifelong learning policy’ and the wider Lisbon strategy. The common belonging of these countries to the Southern European model of welfare is linked to their ‘difficulty’ (and the relative ‘distance’ from the European standards) in the alignment with the policy technologies of the EU. The chapter describes the performances together with some of the differences in translating the logic of decentralisation. It then aims at discussing different lines of interpretations (macro-social, institutional, cultural) for these enduring ‘difficulties’.

Introduction

This chapter analyses the performances and the emergence of new forms of governance of schooling systems of the countries of the Southern European model of welfare (Ferrera, 1996, 2000). We will see how the process of fabrication of the European space has the effect of pressing isomorphic changes on the patterns of governance of national policies and schooling performances. In some way, this homogenisation can be interpreted as the implementation of the discourse of the knowledge (or the learning) society which seems to diminish the ‘force’ of national policies within the policies of education. However, a look at the performances of those countries as well as at the attempts to implement new forms of regulation and governance in schooling highlights the *permanence of distinctiveness* in spite of their notable improvements in fulfilling standards, and attempts at reforming their system of schooling. The distinctiveness regards the position of ‘low performers’ according to European benchmarking of the wider Lisbon strategy and the endurance of the state tradition in schooling which influences the trajectory of decentralisation (Green, 2002; Prokou, 2008). The paradox of the convergence *and* divergence reveals the complexities of the alignment where the growing relevance of a transnational force (in this case,

the EU) develops within the 'light' of the national schooling tradition and leads to an hybridisation of global pressures and tradition of local schooling systems.

The chapter unfolds as follows: it first focuses on two homogenising forces in the fabrication of the European education space: performativity and decentralisation. It then will describe how it is possible through these policy technologies to read the common condition of these countries (their condition of 'low-achieving'), and their difficulties in the degree of centralisation-decentralisation in the area of the governance of their school systems. It then aims at discussing the *permanence of distinctiveness* in terms of a *macro-social narrative*, an *institutional perspective* and a *cultural view*.

Performativity and decentralisation in the Europeanisation of schooling

Europeanisation, particularly by means of communitarian politics, activates some trajectories of transformation in the school systems of the member countries, in such a way that, as has been observed by Dale (2000), Europe is increasingly acting as the *agenda-setter* in the field of education. It is notable to consider how this occurs despite the fact that education, and in particular schooling, remains a domain of responsibility of national policies. In this sense, Europeanisation and globalisation converge in a discourse and a common EU engagement to make Europe a 'society of knowledge' and/or learning, capable of increasing its potential of competitiveness in comparison with the USA and Japan¹. This aim, presented in many European documents (in particular, in the European Commission [1995] White Paper), has then been translated into a series of common targets, explicitly formulated by the documents of Lisbon, Barcelona and Stockholm, which engage the various member states. This common strategy, by showing some elements of the *neo-liberal agenda in the field of education* ('free choice', managerialism, the market) – however mitigated by the inclusion of the criterion of social equity – accentuates the instrumental value of *acquirable school competences* (the link with the labour market). While this implies a strong emphasis on vocational education and training, it affects as a global discourse the differentiation between the areas of education and acts upon these boundaries by diminishing their relevance through the powerful 'umbrella' notion of 'lifelong learning', 'knowledge or learning society' which have a wider currency inside transnational policy discourses and policy educational elites (Lawn & Lindgard, 2002). In that respect, particularly relevant as policy technologies of translation of this strategy are: the market, managerialism and performativity (Ball, 1998). These policy technologies overlap and tend to activate a process of restructuring

schooling and practices by affecting subjectivities, identities and practices in the field of education. Here, I would like to draw attention to the principle of *performativity*, that is, the measurability of the results as a discrimination among school performances, and ‘good’ or ‘bad’ schools, and the process of *decentralisation* that tends to overcome the bureaucratic government of schools, in favour of a mode of steering educational organisational fields drawing more (at least in principle) on horizontal links among various institutions (what is sometimes called, with some emphasis, ‘governance’) (Ball, 1998; Magalhães & Stoer, 2003).

Performativity is a ‘technology, a culture and a mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change – based on rewards and sanctions (both material and symbolic)’ (Ball, 1998, p. 45). It implies the setting up of monitoring systems and the production of information in such a way as to produce an ongoing struggle for visualising activities and outcomes, while engaged in the direct practices of teaching and learning, since it supports a view that only what can be measurable and visible is ‘good’, or worth to consider (the ‘terror of performativity’ described by Lyotard [1979]). The principle is applied to individuals, organisations as well as to countries, so that European statistics on education and large investigations become increasingly important as a tool to promote competitive performativities among western countries, or if we look at the European Lisbon strategy, among European countries.

Decentralisation accompanies this principle, since it comes through like ‘winds of change’ across all the educational systems by signalling the demise of state and the role of the state inside the welfare system in favour of greater ‘flexibility’ and, as suggested in a document of the Organisation for Economic Co-operation and Development (OECD) (1997), a ‘devolved environment’. This seems to produce in some way an ‘eclipse of the educational bureaucracy’ (Benadusi & Landri, 2002), as the dominant mode of organisation of the public provision and regulation of the field of education in nation-states, and the emergence of new mode of governance, where it is possible to experiment, at least in principle, many forms of partnership among the many elements of the organisation field of education.

While these two homogenising forces, and the related elements of the market and managerialism, are well visible in many global discourses and documents of transnational education organisation (OECD and, in particular, European writings and reports since the approval of the Lisbon strategy and the reference to the World Trade Organisation (WTO) as a tool for reaching European benchmarks on education), these principles and technologies do not translate into policy texts and national practices in a direct or automatic way. A useful notion, in this case, is

to conceive the re-contextualisation as a translation (not as diffusion) which implies to consider the complex transformation of what is to be displaced and the site where the translation concretely occurs (Czarniawska-Joerges & Sevón, 1996; Ball, 1998). In order to understand how the re-contextualisation occurs and how the alignment develops empirically, I developed here an analysis of performances and of the decentralisation of a selected sample of countries drawing on Eurostat and OECD data as well as on a second-order reflection on the publications derived from Education Governance and Social Integration and Exclusion in Europe (EGSIE) (one of the most relevant European research on the new forms of governance), and the research I am involved in Italy. The cases I will consider are usually classified as belonging to the *Southern European Welfare Model*.

Comparative analysis of the forms of social policies distinguishes different modalities of *welfare capitalism* (Heidenheimer, 1986; Esping-Andersen, 1990). The most successful typology points out three models: (i) the *Scandinavian model*, that includes the North European countries with wider universalistic principles and insurances; (ii) the *Anglo-Saxon model*, drawing on individuals and on capabilities of autonomy, and that comprises the European countries English-speakers; and (iii) the *corporatist model*, where the social inclusion and social assistance are granted *via* work-related schemes and regard European countries of Central Europe. Further analysis led to distinguish the *Southern European Model* (Ferrera, 1996; 2000; Katrougalos & Lazaridis, 2002) by including the countries of then South Europe (Portugal, Spain, Italia, Greece) previously considered a variation of the corporatist model. The presentation of the Southern model was intended to draw attention on the uniqueness of those countries with respect to the other welfare models, and to reduce the possibility of interpretation that considers the difference in terms of backwardness. The debate and the research around the southern difference fed interesting discussions about how to consider the diversity of South Europe and the reason for this distinctiveness. I will explore if this difference applies also to the ways these countries align with the policy technologies of performativity and the process of decentralisation in the field of education. Elsewhere, it has been noted how the dominant mode of state architecture is a relevant aspect in the process of re-contextualisation, so that we have a path dependency from the prevailing institutionalised mode of regulation (Prokou, 2008).

Low performing systems of education?

The countries of the Southern European model of welfare appear to be 'low performing' with regard to European benchmarks. Eurostat data induce us to underline the similarity of characteristics in the four countries with reference to

five key-indicators: (i) the level of achievement among the youth of the secondary degree of instruction; (ii) the percentage of young people leaving early the education and training system; (iii) the rate of adult population (between 24 and 61 years) who own an upper secondary school leaving certificate; (iv) the percentage of public education expense in reference to the Gross Domestic Product (GDP); and (v) the rate of adult population participating in education and training activities (the rate of participation in *lifelong learning* systems).

With reference to the first indicator (see Table 1), the EU (27)² average is that 77.4% of young people aged between 20 and 24 years own at least the school leaving certificate of upper secondary school. In the countries of the Southern European model – with the exception of Greece, which presents a higher percentage (more than 80%) – the number of young people who own this certificate is inferior (the lowest share refers to Portugal, with a percentage lower than 50%). Throughout the decennium (1995-2005), however, these percentages have been in constant growth, underlining the efforts operated by the countries in raising the degree of completion of upper secondary school for an always-wider quota of young people.

TABLE 1: Population aged 20-24 years with at least upper secondary school level education

EU/Country	1995	2000	2005
EU		76.6%	77.4%
Greece	73.8%	79.2%	84.1%
Spain	59.0%	66.0%	61.8%
Portugal	45.1%	43.2%	49.0%
Italy	58.9%	69.4%	73.6%

Source: Eurostat

The data concerning early school leavers (see Table 2) confirm that there is a high level of school drop-outs in the Southern European model. It means that a high rate of young people, for different reasons, leave education and training opportunities permanently, and, consequently, seem to display a less than sufficient repertoire of competence/knowledge. Here, as before, the best

performance is given by Greece, with a portion slightly better than the EU(27) average of 15.6%. Portugal, Spain and Italy, instead, register a very high percentage: almost 22% in Italy, almost 31% in Spain and almost 39% in Portugal. These figures indicate that, notwithstanding the efforts carried out in recent years to reduce the phenomenon, there is a range of young people aged between 18 and 24 who, after having reached the end of compulsory schooling, are not involved in any educational and training activity.

TABLE 2: Population aged 18-24 with at most compulsory school level of education and not involved in any education and training

EU/Country	1995	2000	2005
EU		17.6%	15.6%
Greece	22.4%	18.2%	13.3%
Spain	33.8%	29.1%	30.8%
Portugal	41.4%	42.6%	38.6%
Italy	32.8%	25.3%	21.9%

Source: Eurostat

The data concerning the school leaving certifications in the adult population (see Table 3) confirm that, in the Southern European model of welfare, there is neither an orientation toward the attainment of high school certificates nor a particular interest in formal activities of education and training. In these countries, the range of adult population (25-64 years) with at least the upper secondary school certification is considerably inferior to the EU average (slightly more than 69% in 2005): the lowest result refers to Portugal (26.5%), but low values also concern Spain (48.5%), Italy (50.4%) and Greece (60.0%) – which, although decidedly the highest figure, is still inferior to the EU(27) average.

In a similar way, in these countries, the percentage of the adult population, aged between 25 and 64 years, who participate to *lifelong learning* initiatives (see Table 4) is quite modest. With the exception of Spain which, in 2005, presented a rather odd figure compared to the decennium trend, we note a percentage oscillating around 5% in Italy and Portugal, and an even lower percentage (around 2%) in Greece.

TABLE 3: Adult population (25-64 years) with at least upper secondary level certification

EU/Country	1995	2000	2005
EU		64.4%	69.3%
Greece	42.6%	51.6%	60.0%
Spain	29.5%	38.6%	48.5%
Portugal	21.9%	19.4%	26.5%
Italy	36.3%	45.2%	50.4%

Source: Eurostat

TABLE 4: Adult population (25-64 years) engaged in lifelong learning

EU/Country	1995	2000	2005
EU		7.1%	9.7%
Greece	0.9%	1.0%	1.9%
Spain	4.3%	4.1%	10.5%
Portugal	3.3%	3.4%	4.1%
Italy	3.8%	4.8%	5.8%

Source: Eurostat

Moreover, the lack of attractiveness of the school leaving certificate and the functioning difficulties of schools go together with low investments in education as a percentage of public expenditure (see Table 5). Among the countries of the Southern European model, Portugal (5.61%) spends more than the EU average on education as a percentage of its Gross Domestic Product (GDP). Comparable figures for Italy and Spain are respectively 4.74% and 4.28%. Finally, Greece (3.94%) invests the least in education among the countries of the Southern European model.

TABLE 5: Spending on education as a percentage of GDP

EU/Country	1995	2000	2003
EU			5.17%
Greece	2.87%	3.71%	3.94%
Spain	4.66%	4.28%	4.28%
Portugal	5.37%	5.42%	5.61%
Italy	4.85%	4.47%	4.74%

Source: Eurostat

A further signal of the ‘weakness’ of these school systems comes from the PISA 2003 survey, which assessed the competences of students aged 15 at the end of the compulsory school, by focusing on a whole frame of skills (literacy, mathematics and science) considered to be central under the profile of employability and social inclusion. In this survey (see Table 6), students from countries of the Southern European model reached average scores that were decidedly inferior to the average score of the other countries participating in the assessment exercise (conventionally fixed at 500)³. This concerned all three competencies; in this sense, we can say that the performances in Greece, Portugal, Spain and Italy were constantly below average.

In addition, a detailed look at the degrees of achievement of competence indicates that there is a small area of excellent competences (percentages of responses more than 7) and a relatively large area of very low competences (percentages of responses less than 1). If we follow this logic, we deal with responses showing the presence of a *relatively extended area of school weakness* and, at the same time, a *rather reduced area of school top performances*. These findings probably suggest a still high degree of *elitism* informing these schooling systems.

At the same time, however, we need to consider the differences and the specificities of the performances. In some cases, the *territorial inequalities* can play an important role in explaining the pattern of data. In the Italian and Spanish cases, they have a valuable relevance; they seem to be less important in the Greek and Portuguese cases, where the signalled characteristics present greater uniformity. The Spanish institutional structure which considers the presence of a vast pluralisation of its autonomies also implies a differentiation in the education

TABLE 6: Average scores on the PISA 2003 survey (average ACDE = 500)

Country	Literacy	Mathematics	Science
Greece	472	445	481
Spain	481	485	487
Portugal	478	466	468
Italy	476	466	486

Source: OECD PISA 2003

levels, with a concentration of educational poverty and of functioning difficulties of the school system in specific areas of the country. In the Italian case, in a similar way, the difference between the North and the South implies a concentration of problematic aspects in the South.

Finally, the performances of the single countries depend also on *different starting conditions*. Among the Southern European countries, Portugal is characterised by very high figures of *early school leavers* (almost 40%), the lowest percentage of young people with an upper secondary school title, and the highest percentage of public spending on education in terms of GDP. Spain and Italy reveal, instead, percentages that place them in a relatively middle situation. But while Greece registers the most positive figure in terms of young people with an upper secondary school title, its percentage of public expenditure on education is the lowest among these countries (the estimate is almost 3.5 %) and is considerably inferior to the EU average (superior to 5%).

The 'statist' legacy

The dynamism of the alignment, in the last ten years, of the countries of the Southern European model with respect to the drive to decentralisation reveals the importance of the architecture of the state in the process of re-regulation. In the following paragraphs, the analysis of the national strategies of each country will allow us to point out, when focusing in greater depth, the *nuances* of this displacement.

The enduring centralisation in Greece

The case of Greece indicates that the tendency toward the decentralisation of school systems is not a taken for granted end-result of the translation in practice of the knowledge society. We can say that in the European landscape and in the context of the Southern European model, it rather represents a case of persistent *bureaucratic centralism*, still resisting in the face of the considerable expansion of the educational provision and of the efforts carried out during the last 25 years in the democratisation and modernisation of the educational system (Zambeta, 2002; Gouvias, 2007).

An important turning point in the educational policies took place at the end of the 1990s. In the new climate of the 1990s, there was a decisive move toward the keywords of the market and of globalisation: ‘flexibility’, ‘competence’, and ‘decentralisation’. The reform of 1997, with the approval of Law 2525 and the related decrees of implementation, marked an important step in the restructuring of the Greek school system: the proposal of the institution of the ‘integrated lyceum’, that is, a form of secondary school aimed at giving the students those abilities which will help the Greek students to gain an easier access, after further training and educational paths, to the job market (Gouvias, 2007). This reform was accompanied, through the communitarian funding in the period 2000-2006 (OPEIVT), by a considerable impulse of financial resources (10 million euro) toward the schools and the universities of the country, multiplying both the private and the public formative provision, and translating itself into schools and courses in the first and second level sectors of Vocational Education and Training (VET), and in the development of a permanent e-learning education.

These fundings tended to create a system of VET. In the emerging system, however, the participation of other *stakeholders* still seemed weak, while the role of central bureaucracies was overrepresented (Gouvias, 2007). As far as decentralisation goes, the 1997-1998 reforms seem not to have produced the effective devolution of powers and competences. Bureaucratic government still prescribes in detail the school timetables, the proceedings of certification and evaluation, salary levels and the mechanisms of the professional careers of the teachers.

Decentralisation through school autonomy

The case of Portugal

Portugal, instead, represents a case of *decentralisation through school autonomy*. In the last 15 years, according to the results of the research on school governance in Portugal, the most meaningful changes have concerned: (i) the extension of compulsory instruction; (ii) the increase in the rates of participation

to the various levels of the school system; and (iii) the programme of education reforms in the 1990s (Alves & Canario, 2002). The democratisation of access to the various levels of instruction has meant an increase in the demand for education and training. The boom started at the primary level with the extension of compulsory schooling to nine years (the compulsory period is now from 6 to 15 years in the *ensino básico*), but it also concerned the various segments of the school system up to the upper secondary school. The opening of the system to mass schooling also produced some difficulties due to the deep change of the school audience, now characterised by an heterogeneity of families and by a mixture of social classes, so that, as it has been noted, the advent and the consolidation of mass schooling has also meant, at the same time, its crisis and the need for reforms (Magalhaes & Stoer, 2003). These reforms were, however, developed very late, and meant, according to some scholars, the import of policies already realised elsewhere ten years earlier (Alves & Canario, 2002). Particularly relevant was the intervention to produce changes in the education governance, which focused attention on the schools, and its organisation arrangements.

In this sense, the key-concepts of the reforms have been the autonomy and the *self management* of schools, the participation of social actors, identified as the *stakeholders* of the school service, and the necessity to redefine the role of the state toward the competences of regulation, *mentoring*, monitoring and financing. In Portugal, the school autonomy intersects, at the local level, with the competences attributed to the municipalities⁴. They actually intervene in the institutions of pre-compulsory schools, in the area of *ensino básico* (financial investments), in school transportation, in student residencies, and in the sector of adult education. On the efficacy of such a choice of decentering, the positions are diversified: there are some who appreciate the enlargement of the margins for manoeuvre; there are also those who observe that it has not affected the everyday practices of the school service, and that it has translated into an increase in the organisation of work and committees (Alves & Canario, 2002).

The case of Italy

In the second half of the 1990s, after a long period of normative stability and of practices of *non-decision making*, the Italian education system lived a phase of intense transformation which deeply changed, at least in normative terms, its institutional structure. Probably the development and intensity of such changes originated in the alignment of more *action nets* (Landri, 2002): the process of change in public administration, that is, the reformulation of the role of the state, and the changes in the relationship between public administrations and citizens (Benadusi & Consoli, 2004); the influence of EU policies; and a period of strong

government (Ventura, 1998), when the government was able to carry out fundamental political choices in the field of education and training.

In Italy, three are the trajectories along which the process of *policy* change takes place: (i) the attribution of autonomy to the school establishments; (ii) administrative decentralisation; and (iii) the re-shaping of the education curriculum. The discourses supporting school autonomy are similar to those accompanying the decentring route in the other countries of the Southern European model. Therefore, in the frame of a more general process of reform in public administration, single school establishments were attributed financial, organisational and didactic autonomy.

The school autonomy and the re-shaping of the school curricula are accompanied by a reconfiguration of the governance system of education, which redefines the competences of the different institutional involved actors (state, regions, local autonomies, and autonomous institutes) while delineating a new organisational field (Powell & DiMaggio, 1991), the system of education and training, characterised, in comparison with the formula of the preceding government, by a tendency to the pluralisation of its actors (Benadusi & Landri, 2002; Grimaldi & Landri, 2006).

In this case, as in Portugal, the institutional strategy developed in a top-down direction, in the first instance privileging the autonomy of the single school establishment, and only later starting the process of redefining the organisation field with the participation of the other institutional actors. Even more complex seems to be the re-shaping of the curricula. Here, two reforms – the first one promoted by the then minister, Enrico Berlinguer, and a second one by the subsequent centre-right minister, Letizia Moratti, known as *Riforma Moratti* – have not been implemented (Landri, 2002).

Decentralisation: the role of autonomous communities in Spain

In Spain, decentralisation follows the constitutive elements of the state (the local communities). Actually, the Spanish constitution recognises the role of the autonomous communities; they have a considerable say in different *policies* which they govern with the central state. Here, decentralisation develops in a bottom-up way, since it has been sustained by the different political and cultural components of the diverse communities. Moreover, we can observe that it coincides with the transition to the democratic regime during the 1970s (after Franco's death), and involved the setting up and implementation of mass schooling. In 1990, however, a new act on education (LOGSE) started the democratisation of the system in a decisive manner, through the accentuation of

the relevance of compulsory education and the extension of the period of obligatory schooling (up to 16 years). Its rooting in the autonomous communities (and in other fields of *policy-making*) mirrors a linguistic differentiation which is entirely recognised in the school field. This is to say that the institutional field of school in Spain is characterised by a model of governance that considers the distribution of powers and of competences among the state, the autonomous communities, the local administrations and schools. This model of governance has effects on the curriculum content, which can be diversified in the compulsory and post-compulsory schools, in accordance with the autonomous communities. In the case of compulsory schools, for instance, the state determines 55% (in the Spanish-speaking communities) and 65% (in the communities of other recognised languages) of the contents of the central curriculum; the autonomous communities decide on their own the content and curricula of the remaining quota (between 45% and 35%, the first level of responsibility); the schools develop such curricula on the local plane (the second level of responsibility); and, finally, the single classes and the teachers implement and adapt the curriculum to the need of the students. The diversification of the institutional model on the territory produces, in some cases, an excessive emphasis of what is 'unique' in each community, albeit, in a certain sense, counterbalanced by agencies tending the co-ordination, co-operation and collaboration. There are, in this sense, some organisations which are responsible for this task: the *Conferencia de los Consejeros de Educación*; the *Instituto de la Calidad y Evaluación* (INCE), and the *Consejo Escolar del Estado*. This complex design of governance, however, does not seem sufficient to contrast the social differences in Spain. The presence of a dual system within the compulsory school (a strong sector of private instruction), further reinforces the phenomena of school segregation, while producing vicious circles of 'impoverishment' of the quality of the public service (Pereyra, 2002).

Discussion

The analysis of the performances of these countries and of the process of changing governance in schooling indicates the *permanence of distinctiveness*, that is, a 'fatigue' in the re-contextualisation of policy technologies of the Europeanisation of schooling. This has been mainly interpreted along two main lines: a former focusing on *macro-social aspects* and a latter drawing on the conditions of *organisational fields of those countries*. One could add to these reflections the interesting anthropological view which could draw attention on the cultural construction of 'distinctiveness'. These perspectives represent and

account for what is occurring while they provide different enactments of the social (Law & Urry, 2004), that is, they are intellectual technologies treating 'distinctiveness' differently (Edwards, 2004).

Macro-social aspects

A large amount of literature tackles this issue with regard to these countries' difference in terms of the *regime of social protection* and *welfare state* (Liebfred, 1992; Ferrera, 1996; Katrougalos & Lazaridis, 2002), and extends the debate by including the *family models* and the *care regimes* (Jurado Guerrero & Naldini, 1997; Saraceno, 2000). Other research highlights identity in terms of a 'Southern European social model' (Karamessini, 2007) which refers to a specific mode of social reproduction in a particular national/cross-national/regional context in a given period, which basically includes an employment and a welfare regime. Similarly, Mingione (2002) suggests that South-European countries – notwithstanding national, regional and local differences – belong to the *same model of capitalist development* which gives rise to a labour-market structure whose main characteristics are the strong economic role of the family and a not fully proletarianised condition of workers. These features tend to endure and to create *path-dependency*. If we followed this line of interpretation, the commonalities of the countries in terms of indicators of performance and organisation of school systems, at least in the basic characteristics, should be interpreted as a (natural?) *consequence* (almost a reflection) of this history and common development. Here, the 'low educational orientation' of the population, the underdevelopment of vocational education and training, the elitism of the structures and practices, the attainment of 'on the job' labour market skills, the centralised bureaucracy of the educational system, etc. seem to be characteristic of the capitalist development model or the social model of reproduction of this group of countries.

The institutional conditions

This latter interpretation should also be complemented by considering the results of a new institutionalism in education (Meyer & Scott, 1983; Meyer & Rowan, 2006). This tradition of inquiry has identified the dynamics of educational organisations and, in particular, has framed within the context of 'loose coupling' most of the contribution to education research frequently invoked to explain the weak ties in case of the links between the structure and the practice of schooling, and the not-so-strong relationship between policy and administration. While sometimes the notion of 'loose coupling' has been misused, and is being considered in a

reflexive way within the same new institutionalism because of the recent trend in institutional change (Meyer & Rowan, 2006), in our case it draws attention to the conditions which favour the (re)production of the permanence of the distinctiveness, and those dynamics which can alter the *punctuated equilibrium* of an institutional setting. Here, the distinctiveness loses the sense of uniqueness and comes to be interpreted as *institutional inertia*, that is, as a ‘difficulty’ in abandoning the centralised legacy which is revealed in the fragmentation of the organisational fields disabling school performances and organisations.

Here, the different strategies of decentralisation are affected by the legacy of the state-form: Greece maintains and defends its mainly bureaucratic and centralistic model of organisation, and resists, in a decisive way, what is considered the neo-liberal agenda in the field of educational policies; Portugal and Italy follow the path of autonomy of their school institutes, which can be considered as a strategy maintaining a certain centralisation but which opens up opportunities for co-participation in the sector’s *policy-making* process; Spain orientates toward a decentred model of governance, where the local communities play the decisive role in the determination of the educational policies. Such strategies reflect diversity in the more or less decentred and plural *state models* of the different countries; in this sense, the redefinition of the role of the state and of its competences has considerable relevance, because the decentring strategies imply the development of different capacities/competences of governance. In particular, the passage to decentred governance may entail the shrinking of the public sphere (and of the role of the state) with negative effects in the field of social inequalities, which are already well represented in the ordinary performances of the social systems of the Southern European model.

The cultural construction of ‘distinctiveness’

The anthropological view focuses the reflection on the ‘distinctiveness’ of the system, and about the practical purposes of the reciprocal positionings which lead to the attribution of identity and difference (Varenne & McDermott, 1995). In a *cultural view*, in particular, the focus is on the cultural construction of ‘distinctiveness’. The difference of the Southern European countries can be considered in a deficit manner, that is, as a deprivation by assuming European standards and the entire set of benchmarks as ‘objective’ measures of the imagined European education welfare system. More or less explicitly, the ‘deprivation approach’ assumes that it is possible to define what a ‘good’ or a ‘bad’ educational performance is and an ideal organisation of school governance; this lack is also more or less associated with the idea of an impoverished experience in these countries with regard to the education-work realms. However, the distinctiveness

can be regarded simply as a *difference*, and the uniqueness as an expression of cultural diversity: here, we have many cultures of education and learning, and not a dominant European educational culture that defines what a good performance is and what is not. Still, in adopting a cultural approach we draw attention to the *action-nets* which produce situated conditions of assessment where Southern European countries can display their distinctiveness. In other words, we pay attention to how they are made 'distinctive' through a set of arrangements. And this leads us to reflect on the dominant logics of performativity and accountability which emphasises what can be measured and applied to discriminate between 'good' or 'bad' performance of educational systems. In this way, it is possible to analyse the role of transnational actor systems in education, and in particular in what supports the construction of supranational educational space at the European level. This line of inquiry reveals the socio-technical networks attached to the performance of a distinctive Southern European system.

Concluding remarks

The article has analysed the performances and the strategies of decentralisation of governance of schooling in the countries of the so-called Southern Welfare State Model. This reveals a *permanence of distinctiveness*, that is an improvement, yet a persistent gap in aligning with European standards and benchmarks of the Lisbon strategy and a complex drift in moving toward the decentralisation of the schooling systems. Three complementary lines of interpretation (a macro-social, an institutionalist and a cultural approach) may be helpful in understanding and making this difference. Further research is needed to deepen our understanding of the effects of the Europeanisation of schooling in those countries and, particularly, on the influence of the entire 'reform package' for those systems of instruction.

Notes

1. Kuhn (2007) offers a vast ranging analysis of *learning society* politics. For the Italian case, see Landri & Maddaloni (2007) in the same volume.
2. The EU expanded to 27 countries in 2004. Consequently, for EU(27) data refer to the 2005 entries in the data tables.
3. This chapter was completed before the publication of the results of the PISA study of 2006. However, the analysis of these recent results does not modify the main arguments presented here in a substantial way (see www.pisa.oecd.org).
4. In Portugal there are two autonomous regions: Madeira and the Azores Isles, which enjoy a considerable autonomy in the organisation also on the level of school and education politics.

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