

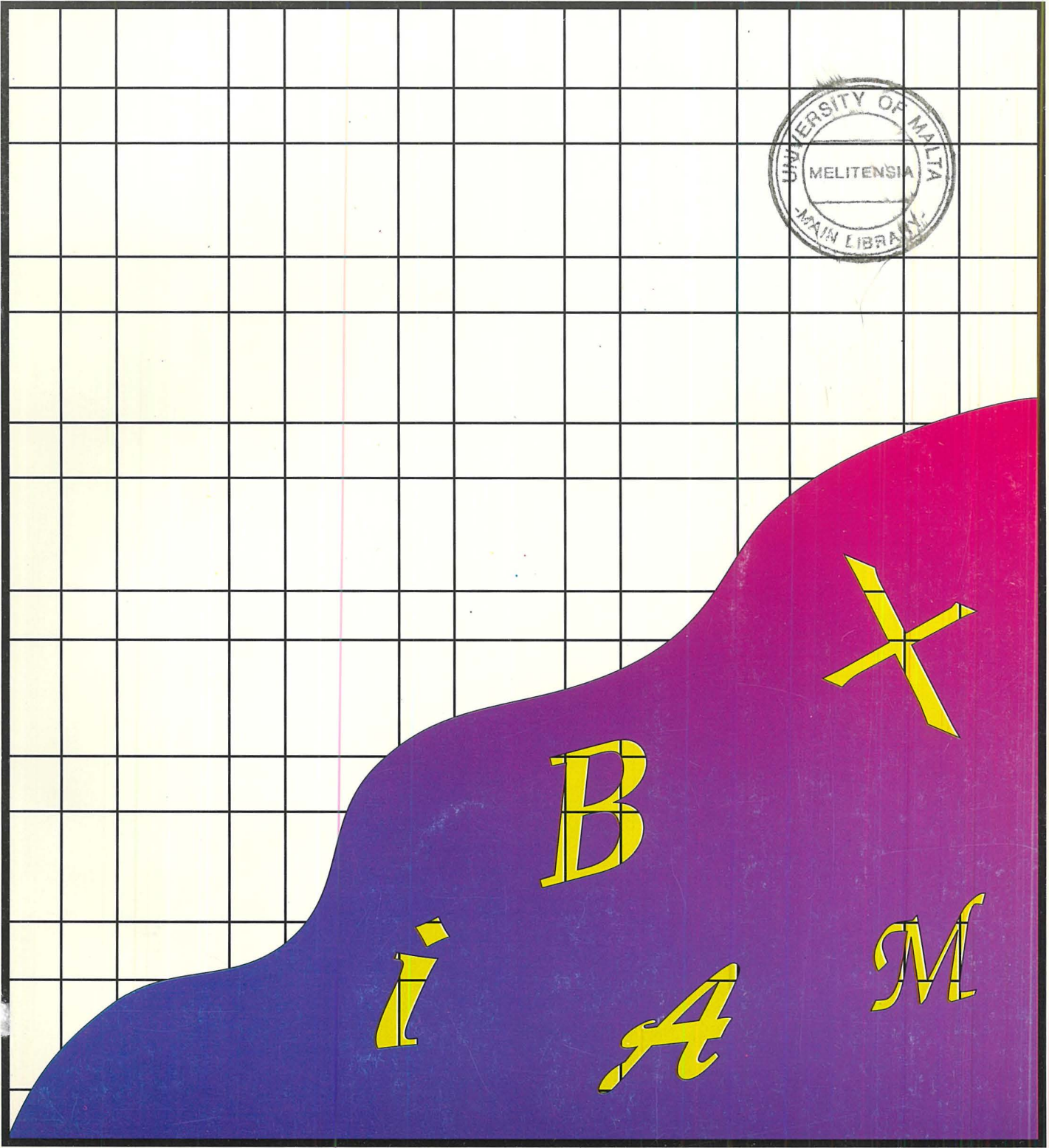
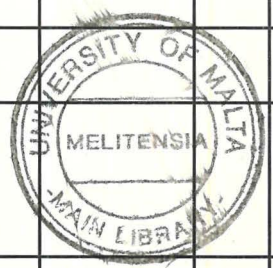
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The Parent as 'Subject' - Beyond Liberal Discourse in Parental Involvement in early Childhood Education

Carmel Borg

There is a growing trend towards parental involvement programmes in early childhood education. In most of the programmes, the major objective is to enhance the parents' ability to facilitate their children's development, particularly where the conditions for 'normal' development are found wanting. This reformist trend is reviewed in the first part of this article. In the second part, the review will serve as a backdrop to a critique of liberal discourse in parental involvement, leading to a reconceptualization of the issue. The argument carried through this article is that the notion of parental involvement is central to the process of democratic control, and therefore needs to be grounded in a political project that engenders personal and social empowerment of parents. Such a project demands a pedagogy that recognizes the different voices, knowledges and identities that constitute the parental body; a pedagogy that is fully cognizant of the fact that parents differ in terms of location, cultural capital, habitus, and personal experience within the education system. In other words, there are parents who have benefited from the social relations that characterize mainstream schooling and others, perhaps the majority, that have experienced a sense of powerlessness. It is the latter category of parents that the project for parental involvement in question will mostly address. By adopting a language of critique, traditionally disenfranchised parents will dig into the past to reclaim their personal, class and gender history in order to subjectively understand why conservative and liberal discourse in education has failed them, with a view that they will eventually embark on a project of possibility that will not only promote equal partnership but also substantial transformation in the educational process itself.

The Theory, Research and Practice of Parental Involvement in Early Childhood Education - A Review

There is a general understanding among early childhood theorists, researchers and practitioners that the family milieu represents the most significant part of the environment of the young child (Bauch, 1990; Epstein, 1987; Meyerhoff & White, 1986). Parents and other members of the family are conceived of as primary educators in the life of the child, and it is widely held that, initially, scholastic achievement may be more related to family influences than any other variable (Central Advisory Council, 1967; Range et al., 1980; Tizard & Hughes, 1984).

The current emphasis on parental involvement may be linked with the almost obsessive, albeit reformist, search, in early childhood quarters, for the kind of environment that would enable a child to develop to his/her full potential. Historically, in the West, such a search can be traced back to the liberal discourse of Jean Jacques Rousseau (1712-1778). Infuriated by the absolutist regimes of his day, Rousseau sought to address contemporary injustices by suggesting an alternative *social contract* based on the concept of equality. Rousseau's new society centred round his unconditional faith in society's ability to regenerate itself under particular social conditions. For Rousseau, regeneration was tied to one major condition - protecting Emile from the society he knew, freeing the boy from artificial restraints (Weber, 1984). He implored mothers (sic) to let their children eat, run and play as they wanted and to trust the child's impulses, and to "cultivate, water the young plant or it dies, it will one day bear fruit delicious to your taste" (in Archer, 1965, p.56).

Johann Heinrich Pestalozzi (1747-1827) sought to concretize Rousseau's liberal vision by organizing classes for children of peasants in his home. While experimenting with materials and meth-

ods of teaching, Pestalozzi maintained a constant faith in the nurturing potential of the family. Homes, to Pestalozzi's mind, could provide children with a solid foundation in moral growth, self development and social regeneration. He wrote: "for children, the teachings of their parents will always be the core, and for the school master, we can give thanks to God if he is able to put a decent shell around the core" (in Berger, 1981, p.40).

Friedrich Froebel, a contemporary of Pestalozzi, emphasized mothers' role as first educators (sic). From its inception, Froebel's kindergarten movement recognized parents as important components in early childhood curricula. In his book *Mother Play and Nursery Songs with Finger Plays*, a manual for mothers to use with their children (sic), Froebel welds play, an ideal medium, to his mind, for the release of the child's creative energy, with his faith in parental (read mothers') involvement.

In the twentieth century, theorists continued to provide inspiration to supporters of parental involvement. As with previous centuries, most of the theorists operated within the liberal tradition.

Erik Erikson's *Childhood and Society*, first published in 1950, analyzed eight stages of development. He emphasizes the first four stages of childhood: trust vs mistrust, autonomy vs shame and doubt, initiative vs guilt, and industry vs inferiority. His theories reflect the belief that social and emotional health, of utmost importance to the child, depends on a nurturing early life.

Piaget (1896-1980), the Swiss genetic epistemologist, studied changes in how children process information as they mature. His research led him to suggest that children, in their quest to adapt to the environment in ever more efficient ways, learn by internalizing increasingly complex and sophisticated techniques of survival. Piaget calls these techniques "schemes".

By providing stimuli for assimilation, and contradictory evidence that challenges existing schemes, the environment, according to Piaget, plays a crucial role in the process leading to the accumulation of increasingly sophisticated schemes. Hurst (1987) points out that three notions pertinent to the understanding of this process are the need for repeated experiences from which conclusions can be drawn, the crucial role of feedback from the environment (whether human or not) in confirming or disproving the child's ideas, and the role of imitation as mani-

festes (first) in physical movement and (then) with various modes of play and representation. In the repetition of experience, the provision of feedback and an environment conducive to imitation, significant adults that come into contact with children contribute heavily to their learning. Parents can be seen, for this reason, to play a leading role in the development of their young children.

Vygotsky (1896-1934) provided the early childhood community with an alternative paradigm. Inspired by the social philosophy of Marx, he speculated that "all fundamental human cognitive activities take shape in a matrix of social history and form the products of sociohistorical development" (Luria, 1976, in Thomas, 1985, p.304). From this perspective, Vygotsky (1962, 1978) theorized that just as society has developed historically by interacting with the products of its own activities, so the individual child must develop psychologically through his/her experiences in that society. The historical dynamics in which the child operates and the child's own developmental history with respect to his/her experiences in that society are conceived by Vygotsky as major determinants of the child's developmental march from basic interaction to higher mental functions. In Vygotsky's scheme, adults, particularly parents, play a crucial role in providing the child with the cultural context and the cultural tool of language through which the child's development proceeds.

Driven by this emphasis on the use of language as a cultural moment psychologists of Vygotsky's school urge parents to involve themselves closely in their children's language acquisition. Pearson (1991) reports that parents from the former Soviet Union "are given specific recommendations as to how to reinforce the language skills of their children so that they can use them to organize their inner life, their emotions, and their will, as well as their ideas. The richer a child's language, the stronger and more flexible will be the "tool" with which he or she can manipulate and interact with the outside environment" (p.156).

Convinced of his belief that early experiences were crucial, Hunt (1961) concluded that "it might be feasible to discuss ways to govern the encounters that children have with their environment, especially during the early years of their development, to achieve a substantially higher level of intellectual capacity" (p.363)

In the U.S., Hunt's belief in environmental mediation as a means for achieving higher mental

functions was shared by a growing pool of researchers, particularly behavioural psychologists, interested in early childhood. This idea also caught the imagination of policy makers in the U.S. who, faced by the political turmoil and social unrest that characterized the 1960s, identified early childhood intervention programmes as one of the means for breaking the cycle of economic deprivation. Early intervention, it was believed, would solve the problem of underachievement, and could help "deprived" children become more effective in their interactions with the environment. This rationale led to a dramatic increase in early childhood provisions (ex. Head Start, Home Start and Project Follow Through) that, from their inception, involved parents to different degrees. In 1968, the British counterpart to the U.S. early childhood contribution to the *War on Poverty* was launched in the form of the five Educational Priority Area Projects (Smith, 1980).

While the *War on Poverty* ceased to provide the main impetus for parental involvement, participation of parents has become a fixture in many early childhood programmes. The models adopted by early childhood programmes reflect different conceptions of parental involvement. Bauch (1990) distinguishes between two models - a delegation and a partnership model. In a delegation model, parents are involved in a minimal way by, for example, monitoring the child's progress and attending school events. This model is usually prevalent in traditional educational systems where parents and teachers are viewed as separate entities playing different roles. Usually, in schools that adopt the foregoing model, decisions regarding school management, curriculum and staffing are considered as professional chores. As a result, parents are barred from sites of power.

On the other hand, Partnership models view education "not as a service to be delivered but as a process of human development in which all the partners' contributions are integrated so as to make meaning whole for the child" (Bauch, 1990, p. 74). Partnership models vary from parent education which includes the concept of bringing parents into the classroom, training parents for more effective parenthood, and general education, to paradigms that include parent participation in the control of programmes (Day, 1980).

While the last three decades have seen a continuing upsurge of interest in the concept of parental involvement, a great deal of effort has been devoted to provide early childhood stakeholders with

evidence regarding the role of home environments in early childhood development (e.g. Baumrind, 1967, 1971; Clarke-Stewart, 1977; Cochran, 1987; Colwell, 1961; Consortium, 1982; Cornelius, 1989; Dion, 1974; Ginsburg & Russell, 1981; Hetherington & Parke, 1975; Nelson, 1973; Parke & Collmer, 1975; Tizard and Hughes, 1984; White & Watts, 1973). This genre of research continues to convince many in the early childhood realm that the role of the home as a formative resource for affective, social, cognitive and linguistic development is fundamental. In some cases, studies also highlight what a crucial role parents play in comparison to overburdened teachers (Tizard & Hughes, 1984).

Projected outcomes of parental involvement programmes have been the subject of extensive research (Berrueta-Clement et al., 1984; Lazar & Darlington, 1982; Levenstein, 1970; Madden et al.; Olmsted, 1991; Pfannensteil & Seltzer, 1989). In early childhood circles, these outcomes provide "a rationale for the belief in the potential of professionals and programmes to contribute significantly to children's development and well-being through their parents" (Cataldo, 1980, p. 176). While it seems that there are some strong leads into the impact of parental involvement programmes, some researchers have rightly cautioned about the limitations that exist in our knowledge of the benefits of parental involvement programmes (Lazar & Darlington, 1982; Pfannensteil and Seltzer, 1989). Most of the research is quantitative and positivist in nature, often targeting children from impoverished backgrounds. Evaluation has too frequently been focused on cognitive development and gains in intelligence (sic). Moreover, most of the research deals with short term effects. Finally, experimental or demonstration programmes have operated in settings outside the public school system.

Parental Involvement Research and Programmes - A Critique

The historical moment that spawned the proliferation of parental involvement programmes in early childhood education in the U.S. was marked by a Federal Government swamped in a deep legitimacy crisis. Challenged by a powerful civil rights movement, that was taking the U.S. Government to task on several issues, ranging from racist policies to systemic poverty, authorities rushed in to diffuse dissension. Their response was liberal/reformist in nature, characterized by a massive programme of "rehabilitation" termed *War on Poverty*. As indicated

earlier, early childhood programmes with a parental involvement component formed an integral part of the strategy.

Backed by positivist researchers who identified the deprived others, using all kinds of scientific measurements to define their deficiencies, planners turned their guns on to the very victims of oppression rather than problematizing the oppressive system. Children and families from traditionally disenfranchised groups, viewed as deprived by white, middle class standards, were flooded with a cultural capital that failed almost completely in coming to terms with their stories, histories and knowledges. The main objective of the programmes was to bring "deprived" children back to "normality", and possibly increase their chances of future scholastic success. In Freire's (1972a) words:

Their real desire, on the contrary, must be, let us repeat, to 'recuperate' the educatees, which is as much as to say, to adapt them to the system (p. 175).

By correcting deficiencies that positivist researchers identified as major correlates of poor achievement, it was predicted that "the ambitious efforts of teachers will [not] fail as a result of community and familial influence that may have affected the children's perceptions of themselves and their view of their world" (Range et al., 1980)

The reformist agenda that inspired the birth and growth of parental involvement programmes, left the causes of poverty, a concrete manifestation of social inequality, undiagnosed, focusing, instead, on the symptoms (ex. poor achievement). By pathologizing the personal, and celebrating test scores as supposedly objective indicators of the social, the foregoing programmes, and the whole concept of a *War on Poverty*, camouflaged the real function of the state and its institutions as sites of hegemonic discourse.

To return to the issue of legitimation, the vast literature in the critical tradition that has been published over the past thirty years attests to the contradictory function of education systems operating in capitalist societies (Apple, 1978, 1979, 1982; 1985; 1988; Apple & King, 1977; Apple & Taxel, 1982; Apple & Weis, 1983; Aronowitz, 1973; Bernstein, 1977; Bourdieu & Passeron, 1977; Bowles & Gintis, 1976; Carnoy, 1982; Willis, 1977; Young, 1971; Young & Whitty, 1977). While modernizing their crust by trying to accommodate the agendas of different interest groups, these systems continue to

play a leading role in reproducing unequal societies by maintaining a false meritocratic ideology that legitimates ideological forms necessary for the recreation of inequality. Against this backdrop, one may argue that most of the parental involvement programmes, featuring parents that have no control over the socio-economic structure, represent an attempt at legitimizing current social relations while giving parents the illusion of control. Pseudo participation in the context of parental involvement leads to the bureaucratization of parents, and further parental alienation from sites of power. It also leads to cultural marginalization, since, as Freire (1972a) clearly points out, in view of the fact that dominant groups are usually in a position of power to set national and local agendas:

Their ideas and values, their way of being, are announced as if they were-or should be-the ideas, values and way of being of all society, even though the popular classes cannot share them, perhaps of their ontological inferiority (p. 175)

Parental Involvement Programmes - An Alternative Vision

As indicated above, liberal discourse in parental involvement has had the effect of superficially addressing the oppressive reality in which disenfranchised families are living, turning parents and their children into 'objects' for rehabilitation. An alternative vision for parental involvement programmes is based on an emancipatory project that centres around the concept of parents as 'subjects' (Freire, 1972b). In this concept, parents are conceived as authentic beings capable of engaging in creative endeavours and critical thinking. According to this conception, all parents have the potential to be intellectuals (Gramsci, 1971) and to regard the world as a place where their contribution can make a difference (McLaren, 1989). Thanks to the confidence inspired by this process, parents with different roots and social locations reclaim their subjectivity and are reborn as transformative agents. Therefore, parents become active beings, and, in so doing, regain control over their reality. As indicated by Shor, this process ensures that liberation - the triumph of activity over passivity - becomes a permanent condition and that dialogue becomes an important ingredient of an ongoing liberatory process (Shor & Freire, 1987) a product of critical consciousness. Such a transformation not only guarantees a variety of voices but also keeps hegemonic groups at the furthest remove of exploitative positions. This proc-

ess can therefore be considered as a counterhegemonic pedagogy, whereby, as a result of the control they establish over their material existence, parents, as citizens, become the virtual guarantors of social justice.

Parental Involvement as Counter Hegemonic Discourse

The above vision calls for a reconsideration, and eventual reconstruction, of present relations and configurations of power. It is, therefore, counterhegemonic in its ambitions.

Parental involvement as counterhegemonic discourse is based on the fundamental realization that "education cannot be neutral" (Freire, 1972a, p.173). In a talk at the Institute of Adult Education at the University of Dar es Salaam in Tanzania, Paulo Freire (1973) reiterated that:

It is impossible for me to ask you to think about neutral education, neutral methodology, neutral science, or even a neutral God. I always say that every neutrality contains a hidden choice (p78)

By presenting the process of education as a neutral category, the ideological commitment of a system that helps legitimize structural bases of inequality remain unchallenged (Apple, 1985).

Parents should realize that most of the 'deficits' that themselves and their children are often correlated with, are not earned by themselves but are the product of a society that is defined by "asymmetries in the abilities of individuals and social groups to define and realize their needs" (Johnson, 1983, p.11). In other words, children and their families are not functioning in a social vacuum, but rather in a system that is characterized by social stratification and tensions (Freire & Macedo, 1987). Thus, a parental involvement programme that sets out to establish the link between the structural base, culture and power will help parents to come to terms with the material and cultural basis of their oppression, and eventually realize that the "process of dehumanization, although a concrete historical fact, is not a given destiny but the result of an unjust order that engenders violence in the oppressors, which in turn dehumanizes the oppressed" (Freire, 1972b p.21).

Given its concrete, historical nature, parental involvement programmes should centre around the belief that the unjust order can be reversed. For disenfranchised parents, retrieving their personal memories and stories should provide them with a

useful starting point for understanding how the state and its superstructural institutions have unjustly excluded them from sites of social and political control. As bearers of 'dangerous memory', parents shed their peripheral existence and transform themselves into the very protagonists of the programme by engaging in a critical confrontation with their reality. As the programme unfolds, parents should be able to reclaim their voice by affirming their own class, culture, racial and gender identities. It is through these unique instances of self-expression that parents will realize that calls for consensus and homogeneity represent an attempt at "spreading and making legitimate ideological meanings and practice, attempting to win people over and create unity on the contested terrain of ideology" (Apple, borrowing from Gramsci, 1985, p. 16).

Parental Involvement Programmes as Liberatory Pedagogy

Roger Simon (1987) refers to pedagogy as "a more complex and extensive term than "teaching"...To propose a pedagogy is to propose a political vision" (p.371). A programme that is conversant with the reclamation of parental voice is, therefore, incompatible with "banking education" - a reactionary, educational experience that has barred many parents from developing the skills for critical engagement with their world, "subordinating them to the knowledge, values and language of the status quo" (Shor, 1993, p.33).

Liberatory pedagogy is the only form of education through which it is possible to develop a dialectic form of thinking which contributes to their transformation as subjects in their sociomaterial reality. Through liberatory pedagogy parents come to understand themselves better within a historical context. For cultural workers, liberal pedagogy represents a tough choice. In his most recent work, Shor (1993) describes the resistance he encountered in trying to engage students in liberatory pedagogy. However, initial resistance can be surpassed, as Ira Shor (1993) himself attests:

To my amazement, this silent group began an avalanche of remarks. The students found their voices, enough to carry us through a ferocious hour, once I found a "generative" theme, an issue generated from the problems of their own experience (p.3).

Liberatory pedagogy is different from "banking education" in that the educator "seeks to with-

draw as the director of learning, as the directive force" (Shor in Shor & Freire, 1987, p.90). In another piece, Shor (1980) speaks of the "withering away of the teacher" (p. 100). Freire (1987) takes up this issue and clarifies that the "withering away of the teacher" does not mean the abolition of the directive role of educators. However, he distinguishes between the *directive liberating educator* and the *directive domesticating educator*. While both educators exercise authority, a directive domesticating educator usually transforms authority into authoritarianism. McLaren (1989) argues that the choice between a liberating and domesticating educator is essentially a moral choice between "creating a passive, risk free citizenry" and a political citizenry capable of fighting for various forms of public life" (p. 158)

By "withering away" and engaging in liberatory pedagogy, traditional classes are replaced by cultural circles where parents and cultural workers engage in: a live and creative dialogue, in which everyone knows some things and does not know others, in which all seek, together, to know more (Freire, 1971, p.61).

In cultural circles, the content is shaped from the "fabric and texture" of the parents (Kaber Katz & Watson, 1991, p.17). In the context of early childhood, parents join cultural circles with a wealth of knowledge regarding child rearing, child development, discipline, health and safety, communicating with children, problem solving, stories and story telling, play, parental roles, etc. Parental knowledge regarding different aspects of early childhood, together with their personal stories and experiences that reflect the parents' understanding of the world, will determine the bulk of the content on which dialogue in cultural circles is based. As *directive liberating educators*, cultural workers cannot sit back and celebrate uncritically parental knowledge and their perceptions of the world. Using Gramscian terms, cultural workers should challenge "common sense" knowledge and help parents to transform it into "good sense". Furthermore, as *transformative intellectuals*, Cultural workers should seek every opportunity to make "the pedagogical more political and the political more pedagogical. Making the pedagogical more political means inserting [parental involvement programme] directly into the political sphere by arguing that [parental involvement programmes] represent both a struggle to define meaning and struggle over power relations. Within this perspective, critical reflection and action become part of a fundamental social project to help [parents] develop a deep and abiding faith in the struggle to

overcome economic, political and social injustices (Giroux, 1988, p. 127).

There is a history of scholastic failure informing the attitude of subordinate groups towards participation. Often, parents from these groups feel that they lack the requisite cultural capital to participate effectively in the educational process leading to personal and social emancipation. (Lareau, 1992). As a result, they delegate the responsibility on to 'professionals' who, in many cases, are organic to the exclusionary and reproductive process that characterizes most educational institutions. This lack of participation on the part of subordinate groups leaves the door wide open for dominant groups to lobby for their agenda. Equipped with the cultural capital legitimized by the dominant discourse in education, "middle classes are very vocal and deeply involved in the educational system. In the United States they dominate Parent Teacher Associations" (Western Hemisphere Seminar, 1986, p.23).

While cultural circles constitute an important forum for parents to read the world, articulate their needs and acquire the skills for real participation, parents and cultural workers cannot stop short of reflection. The language of critique has to be transformed into a project of possibility that, as I see it, will reach an important emancipatory stage when schools are reclaimed as sites of struggle for personal and social empowerment for economic and political emancipation. To my mind, this important stage can be reached through a process whereby society disowns the concept of schools as spheres of teaching in a hierarchical framework, controlled by an impersonal and centralized bureaucracy, ultimately reshaping them into zones of community development with a wider spectrum of stake holders. The traditional scenario of parents leaving their children at the school's door step and called in when needed will become obsolete in an equation that views teachers, parents and other stake holders as community workers. Solidarity, an important feature of the foregoing project will be expressed not only at community level but also in an intercommunity movement that struggles for democracy at a national level.

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Attitude and Achievement in Mathematics: A Maltese Study of First Year Secondary Students

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Introduction

The usefulness of mathematical knowledge in today's society is well-documented. Access to power is nowadays determined to a large extent by success in mathematics. Fennema (1980) and Jacobs (1983) both speak of mathematics as the 'critical filter' which determines entry into most of the higher paying careers and professions, and Steinkamp *et al.* (1985, p.259) view mathematics as 'a pivotal discipline related to a broad range of occupational choices'. Mathematics avoiders are cut off from full participation in society (Morris, 1981), and Lorcher (1989) suggests that failure in mathematics not only leads to failure in school but also to a life-long feeling of intellectual inferiority. However, in spite of the fact that mathematics occupies one of the highest positions on educational agendas all over the world, many students the world over are underachieving in mathematics examinations (Shan & Bailey, 1991). This anomaly has long baffled mathematics educators convinced as they are that the number of persons who can understand and enjoy mathematics by far exceeds the number of those who do so at present.

Research in mathematics education has for years focused on devising ways and means of improving the quality of mathematical education and consequently raising students' mathematical performance to more acceptable levels. For instance, both Cheung (1988) and the National Council of Teachers of Mathematics (NCTM) (1987) emphasise the importance of assessing students' dispositions towards mathematics as one of the bases for improving the quality of mathematics instruction. Such recommendations fall within the parameters of a growing body of research examining the relationship of students' attitudes to achievement in mathematics to which Buchanan (1987) refers. In line with this trend, the present paper sets out to investigate the relationship between general attitude and general achievement in mathematics¹. In particular, it examines this rela-

tionship with respect to Maltese first year students in state secondary schools².

Attitude And Achievement in Mathematics: A Brief Review

(a) Causality: a common assumption

Much of the research carried on attitude towards mathematics and on the relationship between attitude and achievement in mathematics is based on the assumption that attitude affects achievement (Aiken, 1970; Schofield, 1982; Quinn & Jadav, 1987). For instance, Suydam and Weaver (1975, p.45) write:

Teachers and other mathematics educators generally believe that children learn more effectively when they are interested in what they learn and that they will achieve better in mathematics if they like mathematics.

Similarly, Costello (1991, p. 122) speaks of 'a common and reasonable belief that positive attitudes, particularly liking for, and interest in, mathematics, lead to greater effort and in turn to higher achievement'. However, he concedes that even if there exists evidence in favour of the assumption that improved attitudes towards mathematics result in improved attainment, the link between attitudes and achievement is not as close as one might expect.

(b) Correlational studies

Generally, the relationship between attitude and achievement in mathematics remains unclear (Buchanan, 1987; Schofield, 1982). While some studies report significant relationships between attitude towards mathematics and mathematics achievement, others do not (Brassell *et al.*, 1980). In his reviews of studies examining the relationship between attitudes and achievement in mathematics, Aiken (1970, 1976) usually cites low positive correlations which do not always reach the level of signifi-

cance. The Assessment of Performance Unit (APU) (1981) reports that researchers tend to find positive moderate correlations of little predictive value between the two variables. However, Norwich and Jaeger (1989) warn that a number of criticisms have been levelled at studies investigating this relationships. They claim that both methodological (lack of statistical vigour) and conceptual (lack of theoretical framework) limitations have been suggested to account for the low to moderate correlations between attitudes and achievement.

Working on data gathered during the Second IEA Mathematics Study (SIMS) conducted in Hong Kong, Cheung (1988) reports low positive correlations ranging from 0.007 to 0.424 between mathematics achievement and the various attitude dimensions investigated. The greatest reported correlation in Cheung's study is associated with mathematics achievement and students' own perceptions of their abilities in doing mathematics. On their part, Fennema and Sherman (1977) also consider confidence in learning mathematics and mathematics achievement (correlation coefficient approximately 0.40) to be more highly correlated than any other affective variable and achievement. This low trend of association is confirmed by Joffe and Foxman (1986) who point out that some APU findings reveal the weak relationship that exists between students' perceived difficulty, usefulness and enjoyment of mathematics and mathematics achievement.

(c) Variables affecting the relationship

Schofield (1982, p.283) opines that his findings on elementary school children suggest that 'the relationship between attitude and achievement...(in mathematics)...varies quite markedly according to a number of factors'. Time of school year when data is gathered, children's academic ability, school level, and children's sex may well be some of these mediating factors. For instance, Schofield (1982) concludes that mathematics attitude and achievement at elementary school level are more strongly related when pertinent data is gathered late in the school year in comparison to when it is collected early in the scholastic year. Reporting on male form one students, Buhagiar (1990) notes that with low achieving students (not necessarily in mathematics) the correlation between attitude towards mathematics and achievement on linear and two-dimensional measurement items is stronger than with the higher achieving ones.

(i) Gender issues

There are indications that the relationship between attitude and achievement in mathematics is stronger in the case of boys, even if studies do exist which show exactly the opposite. Preece (1979) comments that girls' mathematical skill does not appear to reflect their attitude to the subject as it does for boys, and Schofield (1982), reporting low and sometimes even negative correlations between positive attitude and achievement in the case of girls, maintains that attitude and achievement are more strongly related for boys than girls. In contrast, Aiken (1976) refers to a study by Behr (1973) which concludes that the correlation between attitude and achievement is generally somewhat higher for girls.

Maltese research in mathematics education at undergraduate level provides some relevant contributions. Calleja's (1993) investigation of the relationship between attitude and achievement in mathematics at Form one junior lyceum level gives different results for male and female students. He reports that while girls' performance in the annual national mathematics examination is significantly related to their general attitude towards mathematics, this association is not significant for the boys. In contrast, research by Scicluna and Sharples (1993) shows that the general attitude towards mathematics of Form one junior lyceum girls is not significantly related to their mathematics achievement on national annual examinations. However, they claim that this relationship grows stronger by the time girls are at Form two, even if it still remains not significant.

(ii) Form level

The literature review indicates that the relationship between attitude and achievement in mathematics appears to get somewhat stronger as students move up the academic ladder. However, Aiken (1970) cautions that these studies lack consistency in their findings. A study on elementary school children by Schofield (1982) highlights this trend which however fails to reach statistical significance at the 0.05 level. Aiken (1970), while writing (p.559) that 'the correlations between attitude and achievement in elementary school, though statistically significant in certain instances, are typically not very large', reports (p.560) that a number of studies on junior-high school students show 'significant correlations between performance in mathematics and measures of attitudes and anxiety toward mathematics'. With older students, Aiken (1970) cites evidence from a longitudinal study at high-school level by Anttonen (1968) showing moderate correlations between atti-

tude and achievement in mathematics.

Local undergraduate research supports studies suggesting that with the older secondary students the link between the two variables under investigation is apparently stronger. From a study on Form three junior lyceum students, Potter and Templeman (1992) conclude that students' preference of mathematics in comparison to other school subjects is significantly related to mathematics achievement. In particular, they maintain that the higher the preference given to mathematics by the students the better their performance in the national annual examination in mathematics. Research by Mifsud and Schembri (1992) on Form four junior lyceum students points towards a significant positive relationship between students' performance in the national end-of-year examination in mathematics and their attitude towards mathematics.

(d) Causality

Even though the study of causal relationships between attitude and achievement in mathematics is beyond the scope of Buhagiar's research (1990), the author feels that a short pertinent note is due here in view of the fact that causality is briefly referred to in the discussion of the present findings. While Neale (1969) opines that the influence of attitude towards mathematics on mathematics achievement seems to be modest at best, the Cockcroft Report (1982, p.61), quoting from a commissioned study 3, warns 'against over-optimism in assuming a very direct relation between attitude and achievement'. Quinn and Jadav (1987) conclude that apparently no powerful causal relationship exists between achievement and attitude in mathematics at the elementary grade level. Their conclusion corroborates the research findings of the studies they reviewed. Although positive correlations between attitude and achievement are reported, these studies provide little direct evidence on the existence and direction of a causal relationship between attitude and achievement.

However, some research indicating a causal link between the two variables exists. For instance, Mukherjee and Umar (1978) report that improved children's attitudes towards mathematics are reflected in attainment. Again, a study on grade seven children concludes that increases in students' self-confidence as learners of mathematics and in their perception of the usefulness and creativity of mathematics would eventually lead to improvement in mathematics achievement (Cheung, 1988).

Methodology

In this paper, while children's general attitude towards mathematics was gauged by their performance on an attitude questionnaire, the students' marks on the national annual mathematics examinations were taken to reflect their general mathematics achievement.

(a) Instruments: investigating attitude and achievement

A 16 item (8 'positive' and 8 'negative' statements) Attitude Test was constructed to provide a concise summary of early-teens students' general attitude towards mathematics. Test respondents had to indicate their preference to each of the 16 statements from a three-point Likert-scale labeled 'agree', 'disagree' and 'unsure'. Responses were scored 2, 1 or 0 according to whether these reflected respectively a positive, a neutral or a negative attitude towards mathematics. The higher the raw score on the test (minimum = 0, maximum = 32) the more favourable the student's general attitude towards mathematics was considered to be. The test items dealt with the following four factors: (1) enjoyment of mathematics lessons (9 items); (2) career and leisure interests in mathematics (4 items); (3) content judgment (2 items); and (4) social implications of the subject (1 item).

The reliability of the Attitude Test was investigated using internal-consistency reliability techniques, namely, split-half reliability and Cronbach's estimate of reliability (alpha). Split-half reliability, using the special Spearman-Brown formula, was calculated at 0.89 and Cronbach's alpha was valued at 0.90. Test validation utilised convergent and item validity techniques. Teachers were asked to grade their students according to their perception of the students' general attitude towards the subject. A three grade system (A, B, or C) was used. Teachers' gradings and students' performance on the test were found to be related at the 0.05 level of significance for the total sample. All 16 test items were found to segregate students higher on the scale of the criterion (i.e., the raw score) from those on the lower scale at the 0.001 level of confidence. These results indicate the high reliability of the Attitude Test and point to its validity.

The level of consistency in students' responses on the Attitude Test was checked by means of three pairs of opposite test items. The Spearman rank correlation coefficient was computed for each of the

three pairs. Significant correlations ($p < 0.001$) of 0.49, 0.46 and 0.60 suggest that the students gave reasonably consistent responses throughout the questionnaire.

Children's performance in the national 1988\89 end-of-year mathematics examinations (minimum=0, maximum=100) was identified by the present study as an indication of their general achievement in mathematics. Junior lyceum and area secondary students sit for different annual mathematics papers prepared by the Test Construction Unit (TCU) of the Education Department.

(b) Sample

Students ($N=374$; modal age=11) from eighteen Form one classes in 6 state secondary schools took part in present study. Classes were chosen to match the Form one state secondary schools population during the 1988/89 scholastic year by students' sex, type of school and academic ability (85 boys & 106 girls in junior lyceums (JL), and 99 boys & 84 girls in area secondaries (AS)). This sample comprised approximately 9% of the target population.

(c) Procedure

Towards the end of the first semester of the 1988/89 scholastic year the Attitude Test was class administered under test conditions to the selected classes. The regular class teachers were not present during testing and students were given assurances of confidentiality and anonymity. However, as the present study was to investigate the relationship between attitude and achievement in mathematics, a *de facto* disregard of students' anonymity had to ensue. The researcher, by means of specially designed index numbers, could back-trace at will the identity of all the respondents. This information was only available to the researcher, and once all relevant data were gathered and matched these special index numbers were eliminated in favour of other index numbers which fully respected the anonymity of the students. The Attitude Test scripts were marked following the procedure explained previously.

The national annual mathematics papers were corrected within each school by mathematics teachers as determined by the respective school administrations following marking schemes set by the TCU. The researcher obtained these marks through the heads of schools.

(d) Research hypothesis

It was hypothesised that, as regards mathematics, general attitude and general achievement are not significantly related in the population being tested. This association was investigated by computing Pearson's product-moment correlation coefficients between each student's corresponding raw scores of the Attitude Test and the annual mathematics examination. The minimum level for accepting or rejecting the null hypothesis was set at 0.05. A number of sub-samples were identified and investigated as detailed below.

(e) Results

Table I lists the correlation coefficients (r) for the following six sub-samples: JL students, AS students, JL boys, AS boys, JL girls, and AS girls. The total sample, and the boys and girls sub-samples could not be investigated as students in junior lyceums and area secondaries sat for different annual examinations. The reported values of r were checked for chance difference from zero by computing the t -statistic (Freund, 1984, p.450). The table also includes the corresponding sample sizes, t -values and their probabilities of committing type I error.

Table I: Performance on Attitude Test and national end-of-year examinations - correlation coefficients

sample	size	r	t -value	probability
JL students	191	0.00	0.00	NS
AS students	183	0.17	2.32	$p < 0.05$
JL boys	85	0.12	1.10	NS
AS boys	99	0.20	2.01	$p < 0.05$
JL girls	106	-0.06	-0.61	NS
AS girls	84	0.14	1.28	NS

The computed correlation coefficients, invariably low (the highest only 0.20 for the boys area secondary sample), are all positive except for one (girls junior lyceum sample) which is however not significant. The results show that while for junior lyceum students (JL students, JL boys, and JL girls samples) the performance on the Attitude Test is not significantly related to the performance on the national end-of-year junior lyceum mathematics examination, the Attitude Test raw scores of the area secondary students and the boys area secondary samples are significantly positively related to the raw scores obtained on the national end-of-year area

secondary mathematics examination (both $p < 0.05$). The relationship for the girls area secondary sample is not significant. Consequently, the null hypothesis is rejected at the 0.05 level of significance only for the area secondary students sample and for boys attending area secondary schools.

Discussion

The results reported above are based upon the assumption that the general attitude towards mathematics of students involved in this study did not change significantly between the administration of the Attitude Test and the holding of the national end-of-year examinations. In this study the children's attitude was investigated some five months prior to the annual testing period. Ideally, the time passage between the two testing points should have been kept to a minimum. Buhagiar (1990) explains that this lack of control in the research design was due to pressures extraneous to the research itself. The relationship between attitude and achievement is a highly complex one involving a number of factors which could easily have been left out or not given due importance in this study. Again, simple bivariate relationships, similar to the ones investigated in this paper, can potentially ignore the more complex and subtle relationships that may exist between attitude and achievement (Schibeci, 1984). Consequently, the interpretation of the present findings cannot exclude the possibility that had the issue been otherwise investigated, different conclusions could have been reached. In view of these limitations, it is recommended that conclusions presented in this paper should be viewed with caution.

Present findings seem to support studies which conclude that the relationship between attitude and achievement in mathematics is weak at best (see reviews by Aiken [1970, 1976] and APU findings reported by Joffe and Foxman [1986]). The low correlations reported in this study, ranging between -0.06 and 0.20, are in line with the APU (1981) conclusion that in mathematics attitudes contribute little to the prediction of performance. In agreement with Preece (1979) and Schofield (1982), the present study reveals stronger relationships between attitude and achievement in mathematics in the case of boys. Considering the various male and

female samples in the present study, one notes higher correlations for the male samples (JL boys $r = 0.12$; AS boys $r = 0.20$) over the corresponding female samples (JL girls $r = -0.06$; AS girls $r = 0.14$). Again, the relationship between attitude and achievement is stronger when academically weaker students are involved. All Junior Lyceum samples (JL students $r = 0.00$; JL boys $r = 0.12$; JL girls $r = -0.06$) have lower correlation coefficients when compared to their area secondary counterparts (AS students $r = 0.17$; AS boys $r = 0.20$; AS girls $r = 0.14$).

Maltese studies examining the relationship between attitude and achievement in mathematics have generally focused on junior lyceum students. Speaking of junior lyceum students, the present study infers no significant correlations between these two variables for both the boys and the girls samples. Calleja (1993), working on Maltese Form one junior lyceum children, agrees only partially with the findings presented in this paper. While he agrees that for the boys the relationship between the two variables is not significant, he claims that it is positively significant for the girls. On the other hand, a study on Form one junior lyceum girls by Scicluna and Sharples (1993) confirms the present findings with regards to the girls.

Buhagiar's research (1990) includes the investigation of the relationship between general attitude towards mathematics and children's performance on measurement concepts. Students' performance on the Attitude Test is also compared in his study to their performance on the first 17 questions of the 'Concepts in Secondary Mathematics and Science' (CSMS) Measurement Test (Hart *et al.*, 1985). These questions deal exclusively with measurement in one and two dimensions. Generally speaking, the relationships inferred in the present paper between general attitude and general achievement in mathematics are in line with those reported between general attitude and achievement in measurement. In particular, the lack of association between attitude and mathematics achievement is reconfirmed for girls. Even if again it has no predictive quality, it is the general attitude towards mathematics of area secondary students, particularly the boys, which best reflects their achievement levels in measurement. Correlation coefficients between attitude and measurement are also low, ranging between -0.16 and 0.26.

Interesting parallels can be drawn between the

findings of a study on Form one children in Hong Kong (Cheung, 1988) and the present Form one study. However, in the light of research indicating that the relationship between attitude and achievement in mathematics apparently gets stronger as students grow older, the age difference between the two studies calls for purely tentative comparisons. Cheung (1988) reports positive correlations between ten attitude scales and mathematics achievement ranging from 0.007 to 0.424. The LIKE (liking mathematics), EASY (easiness of mathematics) and SOC (usefulness of mathematics) scales of the Hong Kong study are very similar to three of the four factors (1, 3 and 4 respectively) measured by the present attitude questionnaire. The correlations between the LIKE and the EASY scales and mathematics achievement are both rather low, 0.098 and 0.185 respectively. On the other hand, the correlation for the SOC scale is at 0.374 the second highest. In the present study, items of factors 1 and 3 (comparable to LIKE and EASY scales respectively) total 11 out of the 16 test items, while there is only one item pertaining to factor 4 (comparable to SOC scale).

Considering the heavy bias of the present test in favour of items similar to the LIKE and EASY scales, one may hazard to say that the low Hong Kong correlations on these scales are reconfirmed by the present findings (highest correlation only 0.20). The item of the Attitude Test investigating children's perception of the social implications of mathematics (i.e., factor 4) is not likely, given its uniqueness, to have been very influential in the overall relationship between attitude and achievement as measured in the present study. In view of the Hong Kong result on the SOC scale, one may tentatively argue that, had the present test contained more items examining children's perception of the usefulness of mathematics, higher correlations would have been obtained in the present findings. None of the ten scales investigated by Cheung (1988) can be associated with factor 2 (i.e., career and leisure interests in mathematics) of the present test.

The present study does not and cannot draw any causal relationships between attitude and achievement in mathematics. Nevertheless, given the extremely moderate relationships inferred between the two variables in this study (highest value of r only 0.20), one may argue that the present findings apparently give weight to studies claiming either no or weak causal links between attitude and achievement in mathematics (e.g., Neale, 1969; Quinn & Jadav, 1987; Cockcroft Report, 1982).

Conclusion

The relationship between Maltese Form one children's general attitude and general achievement is apparently mediated by their sex and their general academic ability level. Comparing corresponding correlation coefficients, one notes that these are higher for the boys and for the students in area secondary schools. The overall academic level of area secondary school students is generally low, however, they need not necessarily be weak in mathematics. The male sex and the area secondary combination produces the strongest correlation, albeit still low ($r=0.20$), between attitude and achievement. Nevertheless, even for this particular group of children, with just 4% common variance between the two variables under investigation, the significant positive correlation offers no practical predictive value.

Notes

1. This paper presents some findings from research carried out in connection with a Masters of Education degree from the University of Malta (see Buhagiar, 1990).

2. Latest official statistics (1988/89 scholastic year) show that in Malta approximately 68% (boys-59%; girls-75%) of secondary students attend state schools (Central Office of Statistics, 1990). The remaining students receive education provided by the Catholic Church and other private institutions. State school students proceed to single-sex secondary schools after six years of primary co-education. This transition usually takes place when students have already reached their eleventh year. Most year 6 students, towards the end of the scholastic year, sit for a selective examination in five curriculum subjects (Maltese, English, Mathematics, Social Studies, and Religious Knowledge) for admission into the secondary level junior lyceums (JL) which cater roughly for the top half ability group within state education. Successful students must obtain at least a pass-grade in all five subjects, even if the Religious Knowledge examination is taken on a voluntary basis. Students who do not so qualify are channeled into other state secondary schools known as area secondaries (AS) which offer a curriculum geared to the needs of lower achieving students. Mathematics is a compulsory subject at both primary and secondary levels.

3. The committee entrusted with the drawing up of the Cockcroft Report commissioned a study to Dr A. Bell (University of Nottingham) and Dr A. Bishop (University of Cambridge). A summary of this study, entitled *A review of research in mathematical education*, is published by the Shell Centre for Mathematical Education (University of Nottingham).

4. The modal age of the Hong Kong study is 13, while that of the present study is 11.

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Disability and Special Educational Needs: Some Perennial European Concerns

Len Barton

In this brief paper I propose to first, offer some opening remarks including my reasons for personal involvement in this particular field of study. Secondly, I will identify some key issues relating to disability which European societies are struggling with. Finally, I will make some concluding remarks.

In this paper I have been *very selective* over the issues I will attempt to briefly examine. Please do not see this as implying that I do not feel equally passionate about other issues such as parental participation.

I do not want to give the impression that European societies have effectively engaged with these issues and all that is necessary is to emulate them. Nothing could be further from the truth. These are some key concerns that are being struggled over. Thus all European societies are open to criticism on each of these issues.

Finally, educational issues, and disability is no exception, are complex, contradictory and contentious. This topic, therefore, raises the most fundamental questions and values. The process of engagement is thus both exciting and disturbing.

Setting the Context

From my experience of both researching and working with disabled people, I do believe it is essential that any able-bodied white, male, academic makes public the reasons for their involvement. In my academic life particular perennial issues have been at the root of all my work. These are fundamental concerns relating to inequality, social justice and the struggles of marginalised groups. Such interests are not unrelated to my personal experience of being a working-class youth in a one-parent family, living within poor socio-economic conditions. The question of disability raises all the aforementioned concerns and more, which demand urgent, serious and what one disabled analyst has called 'emancipatory research' (Oliver, 1992). Another reason for my involvement arises from my personal experience of

being a school failure and a difficult, troublesome pupil. In a forthcoming publication I have attempted to describe my experiences in the following way:-

"The issue of labeling is a very significant topic for me because it was such a crucial element in my school experience. I was a school failure and left school without a single qualification. I attended an all boys' secondary modern school, having failed my 11+ examination. Traditional methods of teaching, streaming and coercive forms of control were central features of the life of the school. Acts of public degradation, often culminating in physical punishment, remain vivid in my memory. The daily enactment of negative labels such as 'thick', 'stupid', and 'hopeless' reminded me that my position within the school was one which 'could only be expected from a person like me'. Any sense of self-pride and collective identity had to be achieved and maintained against an essentially demeaning environment. Thus, whenever I think about the question of labels, painful memories are resurrected." (Barton, 1993, p.31).

The question of disability requires a recognition of the centrality of the social construction of categories, of power-relations and conditions and of the specific historical social context in which these intersect, are experienced and challenged. This provides another set of complex factors influencing my commitment to this issue. Finally, and without minimising the reality of personal suffering which is a feature of disabled people's constant experience, the question of disability is what C. W. Mills calls a *public issue* and not a personal trouble (1970). It is a hostile, unfriendly, discriminatory environment which needs to be challenged and changed. Explanations which mainly focus on the individual will ultimately be inadequate.

Some Perennial Issues: A European perspective.

1. Defining Disability

How disability is defined is of crucial impor-

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tance. The presuppositions informing particular definitions can be offensive and provide the basis of stereotyping and stigmatisation. One of the dominant influences shaping policies and practices has been the medical model. From this perspective there is an emphasis upon an individual's inabilities or deficiencies. 'Able-bodiedness' is viewed as the acceptable criterion of 'normality'. Terms such as 'cripple', 'handicapped', 'retarded' or 'spastic' reinforce this type of individualised medical definition in which functional limitations predominate.

In a powerful critique of the medical model, Brisenden (1986) who was himself a disabled person vividly describes his feelings in the following way:

"We are seen as 'abnormal' because we are different, we are problem people, lacking the equipment for social integration. But the truth is, like everybody else, we have a range

of things we *can* and *cannot* do, a range of abilities both mental and physical that are unique to us as individuals. The only difference between us and other people is that we are viewed through spectacles that only focus on our inabilities...."(p. 3).

This particular perspective which Brisenden refers to entails a set of assumptions, priorities and explanations which are themselves disabilist. These can get translated into the questions researchers ask in investigations involving disabled people. For example, in September 1988 the Office of Population Censuses and Surveys (OPCS) published a report which included findings on various issues relating to disability. One disabled analyst has criticised the disabilist assumptions informing the interview schedule and has produced an alternative set of questions. These are informed by a social theory of disability. It is useful to contrast these:-

OPCS 1986 SURVEY

- Can you tell me what is wrong with you?
What complaint causes your difficulty in holding, gripping or turning things?
- Are your difficulties in understanding people mainly due to a hearing problem?
- Do you have a scar, blemish or deformity which limits your daily activities?
- Have you attended a special school because of your health problem or disability?
- Does your health problem/disability mean that you need to live with relatives or someone else who can help look after you?
- Did you move here because of your health problem/disability?
- How difficult is it for you to get about your immediate neighborhood on your own?
- Does your health problem/disability prevent you from going out as often or as far as you would like?
- Does your health problem/disability make it difficult for you to travel by bus?
- Does your health problem/disability affect your work at present?

(OPCS 1986)

ALTERNATIVE QUESTIONS

- Can you tell me what is wrong with society?
What defects in the design of everyday equipment like jars, bottles and tins causes you difficulty in holding, gripping or turning them?
- Are your difficulties in understanding people mainly due to their inabilities to communicate with you?
- Do other people's reactions to any scar, blemish or deformity you may have, limit your daily activities?
- Have you attended a special school because of your education authority's policy of sending people with your health problem or disability to such places?
- Are community services so poor that you need to rely on you with the right level of personal assistance?
- What inadequacies in your housing caused you to move here?
- What are the environmental constraints which make it difficult for you to get about in your immediate neighborhood?
- Are there any transport or financial problems which prevent you from going out as often or as far as you would like?
- Do poorly-designed buses make it difficult for someone with your health problem/disability to use them?
- Do you have problems at work in anyway because of the physical environment or the attitudes of others?

(Oliver, M. 1990)

Now an important question arises therefore, - What is the definition of 'disability' informing the discussion document on 'Special Education' in Malta?

The perspective which disabled people and their organisations are increasingly supporting in Europe is one in which 'disability' is viewed as a form of oppression. It is thus an unadaptive, unhelpful and unfriendly environment which needs to be examined and changed. Such physical and social restrictions have been highlighted by Oliver (1990):

"All disabled people experience disability as social restriction, whether these restrictions occur as a consequence of inaccessibly built environments, questionable notions of intelligence and social competence, the inability of the general public to use sign language, the lack of reading material in Braille or hostile public attitudes to people with non-visible disabilities" (p. xiv- Introduction).

Being concerned with the well-being of disabled people requires an examination of those material conditions and social relations which contribute to their dehumanisation and isolationism.

Listen to this disabled (Maltese) person writing in *The Times* on Friday 18th June 1993 about his experience on a recent visit to Malta:

Sir, - I always wanted to visit the country of my birth, but I was appalled at the lack of facilities because of the high and numerous steps, most shops, banks, and most other public places are out of bounds for someone in a wheelchair (p. 4).

Such restrictions result in *social exclusion* or for the few who manage to interact the painful experience, stemming from censure and unfamiliarity, of the patronising, individualised 'gaze'. The categories we use to clarify our thinking about disability are crucial because of the serious danger that:

"once having categorised a child we use our a-priori knowledge of that category, rather than what we learn empirically from the child, to determine our total image of the child and all our predictions of his or her potential" (Daunt, 1991, p. 136).

2. Segregated - Inclusive Provision

The issue of disability provides an opportunity for raising serious questions about the nature of the existing society and the kind of society we would like to see develop. Furthermore, it gives us a concrete example of the complex and contentious nature of the issues involved. A vivid example of this is over the question of the form and relationship between segre-

gated and inclusive forms of policy and practice.

Various arguments have contributed at different historical periods to providing the impetus and maintenance of segregated special education. They include the following:-

Grounds for the existence of a segregated form of special education

1. It is viewed as essential in order to offer the type of education such children need.
 - a) They need protection from the unacceptable features of the world including those found in mainstream schools.
 - b) Special schools are staffed by teachers who possess particular qualities - especially patience, dedication and love.
 - c) Special schools provide a special curriculum.
2. It is viewed as necessary on administrative convenience/efficiency grounds. Centralising specialist equipment, support services and teachers is seen as a most effective way of deploying resources.
3. It is viewed as necessary in order to enhance the smooth running of mainstream schooling. The difficult, objectionable and unwanted pupils can be placed in such schools. They include:-
 - a) Pupils from poor socio-economic backgrounds.
 - b) Over-representation of black pupils.
 - c) Increasing numbers of male pupils.

Special education from this perspective involves a discourse and practice of exclusion. It is a process through which difficult and objectionable pupils are segregated from others.

The groups of exclusion involve cognitive, behavioural and physical factors. Often it is a combination of all three.

Increasing numbers of disabled people are expressing their criticism of this type of provision. Their criticisms include over-protective attitudes on the part of staff, low-expectations, inferior curriculum as well as the contribution these schools make in legitimating stereotypes based on ignorance. One disabled woman sums up such feelings in the following way:

"People's expectations of us are informed by their previous experience of disabled people. If disabled people are segregated, are treated as alien,

as different in a fundamental way, then we will never be accepted as full members of society. This is the strongest argument against special schools and against separate provision" (Morris, 1990, p. 59).

Being excluded from daily interactions with their contemporaries, disabled pupils' knowledge of the social world is limited and hardly constitutes a good preparation for participation in society (Fish, 1985).

From this perspective the continuation of segregated schooling or post school institutions for disabled people is attributable mainly to the weaknesses of current policy and practice which fails to meet their needs. These unmet needs can only be catered for in a system of provision which is based on inclusive principles. This involves recognising this as a human rights issue and not one which relies on charity or the favours of powerful groups.

Integration or main streaming means different things to different groups or individuals. One group of active supporters of radical changes in policy and practice in England have created an *Inclusive Education Charter*.

The integration charter

Ending segregation in education for all children and young people with disabilities or learning difficulties.

1. We fully support an end to all segregated education on the grounds of disability or learning difficulty, as a policy commitment and goal for this country.
2. We see the ending of segregation in education as a human rights issue which belongs within equal opportunities policies.
3. We believe that all children share equal value and status. We therefore believe that the exclusion of children from the mainstream because of disability or learning difficulty is a devaluation and is discriminating.
4. We envisage the gradual transfer of resources, expertise, staff and pupils from segregated schools to an appropriately-supported and diverse mainstream.
5. We believe that segregated education is a major cause of society's widespread prejudice against adults with disabilities or difficulties. De-segregating special education is therefore a crucial first step in helping to change discriminatory atti-

tudes, in creating greater understanding and in developing a fairer society.

6. We believe that efforts to increase participation of people with disabilities or difficulties in learning in community life will be seriously jeopardised unless segregated education is reduced and ultimately ended.
7. For these reasons we call on central and local governments to do all in their power to work as quickly as possible towards the goal of a de-segregated education system.

(CSIE 1989)

It is vitally important to recognise that this whole question of inclusive provision is not merely about resources. It is about fundamental values concerning choice, independence and rights. We need to locate this within the context of our vision of society and to what extent society is catering for the needs of *all* its members. How far does a commitment to the principle that all people are to be regarded as of equal value inform the policy assumptions and directives within the National Policy Document in Malta?

3. Part of an Equal Opportunities Policy

If we are to resist complacency and recognise the degree of struggle still to be engaged with if official rhetoric is to be translated into reality in substantive terms in the lives of *all* citizens, then the question of disability needs to be an integral part of a well thought through, adequately resourced and carefully monitored equal opportunities policy. In many societies where it exists it is often a bolt-on, tokenistic gesture. Political action is required if disabled people are to experience greater controls over their lives and a meaningful participation in society. Placing the issue within the context of equal opportunities is essential for the following reasons. First, because disability is a major form of social differentiation in modern societies and thus is part of the wider and fundamental issue of inequalities, discrimination and dehumanisation. Secondly, by being an integral part of an equal opportunities approach it will provide a basis for the identification of those features of the existing society including, policy and practices within specific institutions and contexts, that are offensive, unacceptable and thus must be challenged and changed. Thirdly, such a framework will provide a stimulus for the crucial task of establishing connections between other

discriminated groups (women and black people) in order to engender some common struggles. Fourthly, it will be a means of critically engaging with individualised and deficit models and interpretations of disability. As we have previously noted, it removes the emphasis from viewing the topic as a present trouble, to that of a *public issue*. Finally, it will contribute to equal opportunities policies being non-disabilist by redressing the extent to which disability has been excluded from them.

We must never underestimate the seriousness of the task we face if we are to break down the structures and their ideological supports which exclude, debilitate and control disabled people. This is a *war* and the stakes are extremely high.

To what extent will the developments within Malta address this crucial task?

4. The Voice and Representation of Disabled People

A crucial lesson, but one which is difficult to learn, is that policies and practices in relation to disability must be viewed as neither natural nor immutable. They are social constructions related to specific historical moments and are thus subject to change and are to be struggled over.

What is beginning to be recognised (but there is still an awful long way to go) is that we have historically, seriously underestimated the abilities of disabled people. Indeed, depending on the severity of the impairment, they have had little, or no personal history or identity outside what has been imposed upon them by powerful professionals. Either because of fear, ignorance or paternalistic forms of *care* we have, and still do, deny them their basic human rights.

In Europe we are witnessing the development of self-advocacy movements, of organisations of disabled people in national conferences, protests, and a greater involvement in the decisions affecting their daily lives. For some, especially those with severe learning difficulties, much still needs to be done. Thus, the question raised by Micheleine Mason, a disabled person must be taken seriously by all those, including governments, involved in working in this area:

"Where are the studies asking disabled people what they think of their education so far? Where is the consultative mechanism to improve the service

according to the needs and aspirations of its consumers? You won't find them. Why not? Because disabled people are still the victims of a deeply held prejudice which essentially says that we are incapable of knowing what is best for us." (1990, p. 363).

Disabled people are increasingly challenging many aspects of professional involvement in their lives, and are demanding a greater control over important decisions. This includes:

- a say in the type and amount of service provided.
- more control over the allocation of resources especially in relation to independent living.
- new forms of accountability of service providers to disabled people.
- marriage, sexual orientations/relations.

These demands do raise the fundamental issue of the development and support for organisations *of* rather than *for* disabled people. This is particularly significant in relation to government funds and their allocations. It also challenges governments and policy makers over the question of representation, i.e. disabled people's membership/access to policy and planning committees.

What has happened in Malta and what will happen in the future with regard to this issue?

It is not a favour, or a privilege we are concerned with here, but a basic right to be involved in decisions over their lives, futures and entitlements.

5. Anti-Discrimination Legislation

As a result of the stubbornness of the inequalities and discriminatory practices disabled people experience in society on a daily basis, there is a growing demand in Europe for the introduction of *Anti-discrimination Legislation*. Whilst this is not viewed as a sufficient condition in itself to achieve the sorts of changes felt necessary, it will at least give access to the courts. Thus, for example, Governments can be held accountable and be required to make sure official rhetoric is realised in practice. In the European context this has become particularly important because as Daunt (1991) so forcefully reminds us, that there is not:

".... much evidence that national governments are willing to think in terms of a national comprehensive plan to meet the demands of disabled people; too often they seem to prefer to respond to pressures in an ad hoc way" (p. 174).

What of the situation in Malta with regard to this issue?

Conclusion

What I have attempted to do in this brief paper is to provide some insights into the issues which European societies are struggling with in relation to the question of disability. Clearly, the seriousness and effectiveness of such engagements vary from country to country. However, I do believe that these are perennial concerns.

I am also delighted to be associated with a Conference concerned with the document on a National Policy in Malta.

In conclusion, therefore, I would raise the following notes of warning: First, beware of succumbing to the belief that all this is merely about resources and more of them. Of course it is about resources, **but it is about much more**. It is about fundamental values and the transformation of disability processes, behaviours, attitudes, discourses and structures. It is about developing a view of difference which is positive and enabling. We are not advocating that disabled people be accepted as normal (or as normal as possible) in the current sense of the word, but that they are part of the **accepted diversity** of humanity, which involves the acknowledgment and acceptance of difference. They are thus valued for themselves. (Branson & Miller 1992)

Secondly, beware of 'experts', particularly from the West, bearing gifts of easy, slick, quick answers to these issues. There are none. It is a difficult and demanding struggle which any society is engaged in where the serious concern is to develop social justice, equity and dignity for *all* its members.

Thirdly, it is vitally important to encourage discussion and debate in order to generate a more informed commitment by increasing numbers of people. I hope these thoughts this morning will contribute to this process. This document which this Conference is celebrating must be viewed as an *initial step* in the process of dealing with the important question of disability in Malta. It must not become a basis for complacency.

Finally, this is much more than an academic exercise for me. I actually want to see the world changed. When Martin Luther King, the American black civil rights leader, made one of his famous speeches he stated:

"I have a dream that one day this nation will

rise up and live out the true meaning of its creed - we hold these truths to be self-evident that all men (sic) are created equal."

He uttered these words in the face of a racist society which had a history of slavery and discriminating policies and practices. He spoke from personal knowledge of the effects of such an oppressive system. He dreamed, he hoped, he had a vision. He paid the ultimate price for his beliefs.

What dream, what vision, do we have for Malta? What price are we willing to pay for its realisation?

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Social Class in Malta: Insights into a homegrown relationship with special reference to education

Godfrey Baldacchino

Introduction

The economic and occupational map of contemporary Malta has encouraged strident, though unsupported, declarations that "we are all middle class now"; whereas a number of academics continue to suggest rigid configurations of conventional class categories and hierarchies. While the fundamental relevance of the social class concept and explanatory value in social analysis is nowadays questioned, one has yet to assess whether the Maltese socioeconomic formation and the experiences of production, distribution and exchange warrant an idiosyncratic, locale-specific, interpretation of social class. In other words, is a home grown theoretical framework for social class in Malta justifiable?

Regrettably, a serious study which would work out inductively, from empirical data, a social class topography for contemporary Malta has yet to materialize. This article will nevertheless seek to serve as a further tentative inroad into research on social class in Malta, mainly on the basis of statistical and secondary data, plus some theoretical, albeit admittedly armchair, considerations where there is a dearth of other knowledge. It will propose an emergent, working definition of social class perhaps more sensitive to, and therefore sensible in, the Maltese context. Finally, it will also indicate some of the implications which may result from such new approaches to an otherwise hackneyed theme, using education as the referent.

The Subject of Study

If we accept the proviso that all societies, by definition, engender dynamics which establish an unequal distribution of desirables (Mandel 1968), then the concept of social class will remain a conceptually valid one, a relevant lens through which to scrutinize the patterns and implications of social inequality. Admittedly, the contours and mechanisms of such differentiation may and do change, in reaction to structural and agency initiatives and so

does their transparency. Indeed, one contemporary fad is to stubbornly insist that, given that the class struggle is purportedly over, a benign reference to status groups is more in order. Such a conclusion would, in a sense, be equivalent to throwing out the baby with the bath water; an illustration of a refusal to engage in a demystification of the underlying but pervasive unequal distribution of social power, in all its forms.

I understand social class to comprise both an identity and a structural component. It relates to a contextualised image of the self within a wider social weave - one which is peopled by actors, alone and in groups, operating within or alongside structures, some of which may seem to have an autonomous character and exercising an overbearing influence on other people, other structures, the general social going on. These perceptions are typically organized and reinforced around one or more principles, as is readily documented from interview based research and ethnography. An appraisal of the institutional parameters within which such self location takes place would be more concerned with revealing the, typically pyramidal, layered social class categorization and its organizing themes; research techniques here are likely to be loaded towards macro-statistical and socio-economic data collection and analysis.

This interplay between identity and structure is a sociological fascination in itself. It is to be expected that value positions and hypotheses will be developed and defended, arguing for alternative weightings to be assigned to these parameters in the social class equation. But whether the bias of social class configuration lies towards the objective-scientific or more towards the subjective-phenomenological, whether the source of constituent social power is single or multiple, and whether interpersonal/group/class relations therein are essentially consensual or conflicting are pertinent but different questions altogether. The definitional debate about social class has possibly blunted its incisive

critique of social organization. Energy has been channeled into often academic, sterile jousts between two rather sharply organized factions which, with all due respect, do not appear to mete justice to the theoretical position and vision of their respective mentors, Karl Marx and Max Weber. It may have been this internal preoccupation, a relatively petty exercise waged within a false sense of security, which may have caught social scientists unawares when confronted by the contemporary, neoliberal ideological tidal wave. The post-cold war scenario is likely to have influenced this emargination of a key sociological concept from both scholarly and popular discourse (Baldacchino 1989).

How have the battle lines been drawn? Observers of a primarily Marxist inspiration would emphasise objective class criteria, located ultimately within the sphere of production, with the haves and the have nots demarcated practically on the basis of the ownership and/or control of property, capital and labour power. The Weberian camp, in contrast, would tend to allocate more influence to the sphere of circulation, with a larger number of determining factors - including age, wealth, race, political affiliation, education, gender, over and above occupational status and production relations - brought together in a more pluralist, power jostling configuration (e.g. Marshall et.al. 1988, Chapters 1 & 2).

An Empty Term?

The concept of social class in Malta may have been bandied about so often by so many: It has been used steadily in the context of doctrinaire, political rhetoric (Vassallo 1985); and perhaps partly as a reaction to this, the concept has been thrown out of the window as lacking currency and relevance in contemporary Maltese society. Thus one could easily fail to identify any longer any intrinsic meaning in the term. A case in point is Lanfranco (1989):

"Class. Why is there a tendency of referring to 'The working class'? All people who work for wages and salary are workers, and others may work for nothing. As I see it, the only classes existing nowadays are the elected politicians, and the rest of the people."

And this gobbledeegook becomes even more glaring because it has been left largely unattended by Maltese social scientists to date. Most of the handful of academic contributions on Maltese social class have actually floundered in the shallows, failing to dislodge themselves from abstract and definitional

strictures (Sultana 1991a, p.17). In a sense, this contribution is itself liable to the same deficiency.

Standard Typologies

Social class divisions in Malta on the basis of an orthodox Marxist typology would shape up approximately as illustrated in Box A below. The main difficulty of such and similar typologies is that they assume *a priori* a distribution of social power in terms of ownership or control of the means of production, including the state apparatus. The implicit orientation of the model is towards two main class positions, with a burgeoning proletariat opposed to a power elite. The implications of the pyramid are obvious, perhaps too obvious: the situation is ripe with revolutionary vigour. But is this perhaps a jaundiced exercise in wish fulfilment?

An Occupational Distribution

In contrast, the results of the 1985 census exercise reproduce information on occupational status which uses functional criteria to justify categorisations and demarcations. (See Box B below). Arguably, these have been carried over from previous census exercises, although the comparative value of these is not exploited in the 1985 census report (C.O.S.1986, pp.86-8). They are also easier to note by time conscious census enumerators who also have usually only a skimpy initiation into the realms and methods of social science inquiry. The two relevant tables are broken down by age and gender in the census report (C.O.S.1986, Tables 31 & 32, pp.278-9):

The disadvantages of this kind of classification in contrast to the previous one is that, first of all, the information is provided verbally by the respondent and may thus not be altogether sincere (C.O.S.1986, p.86); secondly, the *occupational* label may be a rather formalistic assessment of a job description which may be very different from its practical deployment: actual tasks and their associated social and technical relations may be easily concealed behind official terminology. Thus, an occupational label devoid of its contextual application is not a strong enough indicator of social class: for example, the employer of hundreds of wage and salary earners and the employer of one skilled tradesman will both figure in the same occupational class category according to this second scheme, but not in the same social class category according to the previous one. Thirdly, the distribution is limited exclusively to full time productive workers: its catchment is therefore restricted to

approximately half that of its competing scheme.

Maltese Nuances?

It seems to me that both these categorizations are too dogmatic and exclusivist, not only in facing up to the perennial boundary problem, but more seriously, in their *a priori* conceptualisation, leaving little room for some important fine tuning which may be necessary in different socio-economic formations. The main difficulty of social class analysis is that observers and commentators may refuse to consider the extant social and economic reality, with its own unique blend of character and historical legacy, preferring instead to stick doggedly and snugly to precast and preset parameters. The two schemata described above are equally deterministic in this respect. Both these classifications after all find ready international support, allow pseudo-scientific comparability and draw copiously and comfortably from existing theorisation. And, let's face it, these approaches are also an easy way out from gripping the bull by the horns and avoiding the mammoth inter disciplinarian and longitudinal rolling research investigation which a proper appraisal of social class cannot ultimately avoid (Portelli 1992). If sociological analysis deals with a reflexive interpretation of the subject of study, then the critical disposition ought to extend beyond the rather circumscribed terrain of the research process and design, infusing also the theoretical and conceptual underpinnings of the investigation. Good, grounded sociology embraces a situational, apart from an empirical, sensibility.

Macro Considerations of Power

In dealing with Malta we are after all dealing with a small island archipelago whose perennial struggle has been to exploit, maximize and cash in on geopolitical variables. The historical development of Malta can be seen to read as a lesson not so much in the establishment and expansion of an autonomous economic production platform but more as a reconstitution of a transfer and rentier (rather than value) orientation and a client status, thanks to "geographical positioning", obviously draped within the dignity and rhetoric of independent and sovereign statehood (Baldacchino 1990, p.88; Boswell 1980, pp.27-30; Delia 1992, pp.48-9). We after all inhabit a small, resource poor archipelago. The survival of its inhabitants has depended, as it continues to do, on its attraction as a node, a hub within a global architecture, a site for the transfer and transshipment of 'merchandise' in all its forms: cargo, finance, tourists

and other invisible receipts (Baldacchino 1992, pp.2-3; Dommen 1981; Legarda 1984, p.43).

Can one, should one, therefore, in all fairness talk in terms of a local elite deriving its socio-economic power primarily because of control over *productive* capacity? Orthodox social scientists may continue to focus on the sociology of industry and on the capitalist relations of production therein as the ascendant casting moulds for social class location, identity and consciousness. And this may well turn out to be the case, where the international global economy is concerned. But the real power game, at least on the Maltese Islands, may be taking place elsewhere. To a considerable extent, industrial power is vested in foreigners based beyond our shores (Brincat 1989, pp.19 *et seq.*); and manufacturing industry in Malta, even at its all-time peak of 1980, never employed more than 10% of the total population (Baldacchino 1988, p.61).

Rather, the *raison d'être* of local economic power seems to be the distributive mechanism - where the key actors are importers, wholesalers, agents, franchise holders, real estate speculators particularly in oligo\monopolistic conditions which Malta's small size accentuates. We may therefore be dealing with a rather nebulous but finely articulated cluster of firms, agencies, businesses and perhaps even families who comprise local merchant, service oriented - rather than industrial, manufacture oriented capitalism. This observation finds ready corroboration from case studies focusing on other very small, resource poor, developing island territories (e.g. Bertram & Watters 1985; McKee & Tisdell 1990).

Hasn't Malta always been, and still remains, a service economy? It is not difficult to argue that even manufacturing industry has, and remains, located in Malta primarily because of the services that the island offers, not so much because of the 'cheap labour' argument. Attracting such industries to small island settings must take cognisance of the concomitant distance to markets, extra freight and insurance costs, absence of scale economies and typically high labour costs (Baldacchino 1993, p.43). Foreign capital location is thus more likely to be engineered successfully by means of heavy subsidies and strategic location, than by the maximisation of value added *per se*.

Isn't the structure of economic power still dominated by a service, local, commercial elite? And with a ubiquitous state impacting considerably on a

sizable chunk of even private economic activity, an influence over the direction and extent of the flow of state largesse, is bound to be another strong (non-economic) determinant of derived economic power. The state joins in this articulated network, both as an actor in its own right and as a powerful instrument for the enhancement of the power of other actors, not least via its function in a welfarist economic system where so much widely acclaimed private enterprise is to be credited ultimately to government deficit spending, public funds, contracts and human resource development (e.g. McKee & Tisdell 1990, p.26).

Although a purely conjectural hunch at this point, would one be surprised to find the pinnacle of this local class structure occupied by an organisational triumvirate enjoying significant inter-family connections and collusions, plus a very ample presence on a large number of company directorships and state appointed boards? A judicious examination of records held by the Registrar of Commercial Partnerships may be enough to reveal this fabric. And any level-headed Maltese who operates in the world of finance would know this; although s/he might - in the interest of self-preservation - not wish to ever acknowledge this in public.

Micro Maltese Work Dynamics

Shifting from a structural to a processual perspective, there are a number of (some obvious) practices indulged in especially by the "working class" in Malta which do not find ready answer in hypothetico-deductive social class theorizations, be they of Marxist or Weberian inspiration. A cursory review of these follows.

The first is the overriding importance of kin and friendship networks which enable individuals to circumvent institutions, laws and procedures to maximise their interests. Network theorisation in sociological research (Boissevain 1968; Boissevain & Mitchell 1973) has been grounded primarily by socio-anthropological fieldwork carried out in Malta (Boissevain 1974). Individuals are seen to occupy the centres of social fields which exist and are cultivated by virtue of personalistic and particularistic relations. These erode impersonal standards of efficiency, performance and integrity; instead they enable an often speedy, economic and effective resort to desirables. Possibly, in the Maltese social formation, the social class concept is on one hand strongly correlated to the political (not only but including partisan) influence and size of one's networks: It is not what you *do* (that is, occupation) or what you

know (that is formal qualification) which matters but, more importantly, *who* you know and who you are, as well as who you know *well* and who would therefore not just promise but will, at the end of the day, deliver the goods. On the other hand, such political influences appear to strengthen, and to be strengthened by, economic - particularly commercial - leverage in the market.

The second is the importance of partisan political sympathy/antipathy as an institutionalised embodiment of such networks. These are therefore perhaps more akin to clans and ethnic groups than to ideologically divided class factions and alliances in the classical tradition (Baldacchino 1989, pp. 109-10). Malta may be lucky in being blessed with the absence of religious, tribal or ethnic conflict. There is however still reason to support the proposition that the Maltese people are close to being two nations (but see Serracino-Inglott 1988). In spite (or because?) of the many policy convergences by the two main political parties - the Nationalist Party and the Malta Labour Party - the perceived outcomes of policy decisions as well as the political behaviour of partisan supporters is more attuned to the analogy of ethnic conflict. The reds and the blues are each armed with a particular set of economic, religious and moral values and vocabulary, each with a fully fledged cultural industry geared to ensure the preservation and social reproduction of diehard supporters. Given this condition, it is not uncommon to find sympathisers of the party in opposition who see themselves as an oppressed ethnic group (Baldacchino 1991, pp.51-2).

Third, there is the widespread existence of small scale enterprises which generate distinct employer-employee relations (Briguglio 1992), at times referred to denigratorily as "feudal relics" (Wright 1978). The positive aspects, fully within the 'small is beautiful' tradition, associated with small firms include a high level of motivation, corporate commitment, flexibility and adaptability (Hollingworth & Hand 1979; Storey 1982). But these all too readily cloud less commendable practices which include typically below market wages and working conditions, lower trade union representation and less protection from arbitrary management decisions than do workers in similar jobs in larger firms (Baldacchino 1990, pp.28-9; Rainnie 1985). This in the context of greater economic vulnerability which leads to systematically shorter organizational life-spans (Bluestone & Harrison 1982, Chapter 7).

There is then the "perverse" distribution of

income where a salariat cannot do without declaring total income on income tax returns, appearing thus to be financially worse off than most skilled manual labour; dominant perceptions also profess that skilled manual labour is financially a more promising occupational career (Sultana 1992, p.324). The Maltese economy continues to suffer from a shortage of technically skilled personnel whose going market rates and conditions are correspondingly very attractive.

Next is the ready resort to moonlighting, part-time work, housework, do-it-yourself jobs and multiple jobs successively and/or contemporaneously, among both men and women (Briguglio 1993; Delia 1987; Sultana 1992, pp.327-9). Underground economic activity of this kind is estimated to account for the equivalent of 25% of the nation's gross national product (Briguglio, verbal communication, 5th March 1993). This situation complicates, to say the least, social class perceptions. Each work experience will tend towards its own compendium of social and technical relations of production, associated images of society, occupational class ranking, income and other variables relevant to the social class equation.

There is next the relative ease with which individuals can develop a particular expertise in the domestic market on the basis of which they can exercise wide spans of discretion and job control, a condition best characterised but not limited to self-employment (e.g. Bray & Fergus 1986, p.94). A consequence of small scale and isolation, it has been described (although presumably not meant denigratorily) as a condition whereby one becomes a big fish because one lives in a small pond (Caruana Galizia 1993).

Last but not least, there remains the perennial difficulty of evaluating the class position of public sector jobs which account directly for about 40% of the total local labour force and, indirectly, to a higher, unknown proportion.

All the above purported nuances remain as yet only sketchily researched if at all in Malta. Nevertheless, the qualifications above seem to propose that the Maltese structure of social inequality contains a very high degree of fluidity, as individuals utilise an impressively wide repertoire of both economic and non-economic variables. Within these dynamics, the location of the self appears to be a highly personalised one, self-location being in terms of a web of coalitions, kinship, patronage (Zammit 1984, Chapter 7) and portfolio deployment and switching. The

critical balance of power between agency and structure in Maltese society is thus heavily circumscribed by the nature and diversity of one's resources. While this in itself is not stating anything new, the most insightful and locally specific detail of this proposition seems to be the overriding influence of the non-pecuniary variables. Rampant opportunities to make or save money (albeit at the cost of self-exploitation and "living to work" and not necessarily declared to one's income tax assessor), plus the critical infection of disproportionately non-economic ramifications of power suggest that the balance shifts in favour of status and political power considerations. An appraisal of expressions of Maltese cultural wisdom seems to substantiate this proposition, couched as they are in an individualistic, clientelistic behavioural cultural framework (Baldacchino 1990, pp.73-83).

Status Exhibitionism

A shift in favour of status exhibitionism can also be readily experienced: A cursory examination of the contemporary Maltese socio-economy suggests that the trappings of modernisation are everywhere. No wonder social class appears to have become a victim of cultural amnesia. There appears to be a near total elimination of absolute poverty, at least in a monetary sense, by a generous, paternalistic welfare state; there is near to full employment, luxurious dwellings and envious quality of life indicators certainly from a contemporary European and North American standpoint, these 'rich' countries being in the tight grip of economic depression and mass unemployment. Ownership of telephones, television sets, private cars, water and electricity consumption... emphatically indicate a widespread distribution of wealth and income. Compared to similar statistics derived from other nations, Malta qualifies with the rather ambiguous status of an "intermediately developed economy" (Briguglio 1988, p.171), quite a commendable feat considering that Malta is intrinsically poor in natural exploitable resources and that its open small economy is heavily dependent on foreign markets, investments and terms of trade.

This observation does not however in itself imply the obsolescence and irrelevance of social classes in Malta. Out of sight is typically out of mind: If we accept that all human societies have bottom heaps, then this layer does not exactly lend itself to any kind of scrutiny, except occasional compassion or disdain - by the press, by academics, by policy instruments. Elites, in contrast, may even enjoy and

cultivate being in the limelight and have the resources to do and be so. Social inequalities persist (e.g. Lockhart 1989), only perhaps that there has been an overall net upgrading of the class structure and that the demonstrability and expression of such a class structure has evidently changed. It seems, for example, no longer a question of whether one owns a car or has a telephone, but *which car* and *what kind of telephone*. Other current fads include designer wear, glasses and pleasure craft ownership (Tabone 1991, p.36). Indeed, it appears plausible to argue today - at least in the absence of alternative evidence - that consumer commodities, especially those considered to fall within the luxury category - serve as positional, status goods, continually charting and recharting the contours and terrain of social class distinction, at least from a subjective, perceptual point of view. In a way this concern can be understood as a reflection of the relative absence of strict economic and political closures in the contemporary Maltese social formation; status becomes thus a default category for social class location and measurement.

But are such and other prestige goods themselves determinants of social class or are they merely epiphenomena of more subtle workings, possibly traced to the economic, infrastructural (and as, is suggested above, commercial) base of the Maltese social condition? One may accuse the status argument above as ascribing too much influence and determinatory power to "market" manifestations beyond the sphere of production which, from the Marxist paradigm, read as appearances and fetishes rather than reality. Another critique is that these are actually not indicators of the *quality of life* but of the *quantity of life*, expressions of socially transparent, consumptive materialism which could be reinterpreted as the expression of a different and subtle poverty, a blind and reckless pursuit of the capitalist logic of sales maximisation. Indeed, status consciousness can be costly and misplaced, if one lacks the economic and fiscal baggage to manage it.

Locating Education

Education and credentialling may not be important independent variables on the road to social and occupational positioning and mobility. Various studies worldwide have already suggested that structural determinants such as family background, father's occupation and parental educational history and disposition significantly determine the attitudes to and achievements in schooling of students (e.g. Boudon 1974; Kelsall & Kelsall 1971; see review in

Sultana 1991b). Schools thus may not only disappoint as instruments of social uplifting - they may actually engrain class location by acting to reproduce the given social structure, ensuring that working class kids get working class jobs, etc. (Willis 1977). A structural correspondence has been argued to exist between the school's social relations and those of production, such that the former replicate the hierarchical division of labour (Bowles & Gintis 1976). It would be most challenging to test the proposition that Maltese schools may also act as reproductive devices but more so within a regime of consumption and distribution, identifying how this is indeed operationalised. A cause - effect relationship between schooling and social/occupational location and mobility therefore appears naive. In the meantime, any failure to obtain success according to the rules of the game is internalised as an intellectual inability for which individuals have only themselves to blame, thus legitimating the educational system's screening and closure functions.

In identifying education as more of an intervening variable, one can then argue that the experience of schooling - and not so much its paper products (certificates and qualifications) - builds and cultivates the access to non-economic variables, which seem to significantly mould and improve access to socially prized resources, including jobs, but also coalitions, alliances and "godfathers" per se. Recruitment practices do not seem to be so strongly based on explicit academic qualifications and other legal-rational considerations, in spite of the whole ethos of formal schooling (Zahra & Ebejer 1992). Perhaps ascribed criteria, inclusive of networking, could actually *explain* the structural distribution of Maltese school children across private and public schools (Darmanin 1991). Educational qualifications in a sense, do not remain positional goods in themselves; rather, the social environment in which education (often schooling) purportedly takes place also promotes interactions and behavioural patterns which may be cashed in eventually - and these interactions may in the Maltese context depend considerably on the location and management of the particular school and classroom setting.

Education and certification may therefore need to be replaced by good contacts with power holders as the key form of social capital transmitted by schools (Dale & Pires 1984, p.61, quoted in Sultana 1990, p.61). In considering knowledge as problematic, the school may act as a conserver of extant social differentiation because it promotes knowledge in the

style and language which discriminate in favour of privileged social groups (Bourdieu & Passeron 1977; Bernstein 1965; Young 1971). And there is here a case to be made for the wider socio-economic capital which the English language provides as against the strictly parochial Maltese in our country. But schools may also achieve a similar outcome by fostering and widening the knowledge held by certain individuals of certain employers, politicians, businessmen, professionals, agents, who are therefore accommodated and populate their personal social network. So much may depend on the turn of a friendly card, strategically placed.

If these qualifiers are correct, then it would appear that one's prospects for social class location and/or mobility remain constrained and structurally determined to a significant extent. This is already being meticulously documented for the Maltese social formation (e.g. Hili 1988; Schembri 1991; Vella 1986). But the manner in which these constraints are actually activated and predetermined may deviate from the textbook models, perhaps even in ways uniquely Maltese.

It may also prove valid to propose here that a gendered perspective to this relationship would be able to trace male domination also to the traditionally wider and deeper social presence of males in Maltese society, permitting these to build, tend and manipulate networks with a greater intensity, frequency and confidence than would women. This because Maltese women's social universe and associated networks are still likely to be inordinately composed of relatively weak, socially powerless members (children? other women?) in relatively more bounded social spaces. Maltese women still by and large plug into social networks which deliver through their male partners...

Admittedly, these ideas are crying out loud for both theoretical and empirical corroboration. They can here only be put forward as hopefully sound and reasonable arguments. But perhaps enough frowns have been raised by readers to jostle some of them into embarking on important sociologically driven research into the character of the (distinct?) Maltese socio-economic formation and on the influence, if any, of educational exposure and credentialling, as well as other significant referents, on an individual's or group class location and active mobility therein.

Discussion

This paper has been an attempt at continuing

what have been described as my early empirical and theoretical forays into the subject of social class (Sultana 1991a, p. 17), extending the argument with a basic plea for home-grown sensibility thanks in particular to my current, mainly unpublished, research on social dynamics and economic problems in small territories worldwide (Baldacchino 1993).

The implications of this observation, were it to stand the test of fieldwork, would be considerable. The linkages with education are an illustrative case in point: Education would not be so readily incorporated into this scheme as the means by which individuals can readily escape from strict class categories and usurp structural social stratification.

One of the uncritically accepted liberal fads associated with the educational system in Malta is that it is a strong, if not the crucial, determinant of social mobility. This is a popular conception in Maltese society and seems to have been borne out from empirical investigations carried out on a fairly representative base in the late 1970s (Boswell 1982; Zammit 1984, p. 139). Yet, in spite of the centrality of this equation in justifying the attraction of education and the corrective potential that it offers in short-circuiting structures of socio-economic, political and cultural inequality, the issue has surprisingly only been sparsely researched. It remains as yet unaddressed head on by any serious empirical investigation drawing, among others, on diachronic methodologies like the "origins & destinations" research conducted in Britain (Halsey et al. 1980; Sultana 1991b, p. 211). The impact of formal credentials as educational outcomes may not be as strong as is purported and popularly believed to be in securing social and occupational mobility, and not even social and occupational placements for that matter; the vital contacts and the formative interactions and impressions built up at school, and within a particular school or class, may be even more powerful assets at the end of the day. Hence schools and schooling may be mediating mostly predetermined social variables and reproduce social formations, but not primarily through the credentialling mechanism. This observation, if substantiated, would have profound implications on, say, the effects of multiple streaming which currently plague the Maltese educational system.

The myth of course shows no signs of erosion, as the rat race for credentialling and placement in certain schools or certain streams continues unabated. Texts such as the *Who's Who* continue to cultivate this belief system, with their testimonial of

BOX A: A Marxist Inspired Social Class Map for Malta

The power elite (controllers of the largest industrial, financial & commercial enterprises in the private sector and the commanding heights of the state system):

large employers	=	112 (a)
the state	=	-executive 75 (b)
		-legislative 200 (c)
		-judiciary 30 (d)

major bankers,
industrialists, businessmen = 33 (e)

-Sub-Total = 450 - (0.2% of total)

-the bourgeoisie (business, professional & senior administrative elements):

employers	=	1900 (f)
professionals	=	8100 (g)
business	=	330 (h)

-Sub-Total = 10,330 (4.6%)

-the petty bourgeoisie (occupying a contradictory class location between the two main class clusters: consists of small businessmen, traders and self-employed artisans, semi-professional and supervisory staff):

small businessmen	=	2000 (i)
semi-professional/ supervisory staff	=	5500 (j)
traders	=	3500 (k)
self-employed artisans	=	8000 (l)

-Sub-Total = 19,000 (8.4%)

-the working class (those whose exclusive source of income is the sale of their labour power or, failing that, reliance on transfer payments):

male employees	=	94,330 (m)
female employees	=	32,890 (m)
housewives, whose spouse is an employee	=	54,000 (n)

-Sub-Total = 181,220 (81%)

-the underclass (peripheral workers and the reserve army - the open and disguised unemployed, elderly workers, the sick and handicapped, part timers and outworkers, child labourers, twilight economy operants):

part-timers (women)	=	6,000 (o)
unemployed	=	5,300 (m)
other workers	=	2,700 (e)

-Sub-total = 14,000 (5.8%)

Grand Total = 225,000 (100%) (p)

(Based on Miliband 1987, but drawing on Vella 1989 & Sultana 1991a). The size of each class grouping is guesstimated by interpolating available data.

Notes to the above:

a= No. of enterprises employing 50 or more employees (C.O.S. 1990, p.200).

b= Heads of Government Departments & Permanent Secretaries

c= Members of Parliament, Private Secretaries to Ministers & Parliamentary Secretaries, Chief Canvassers

d= Chief Judges, Judges and Magistrates

e= Estimate

f= Total of 2,100 from 1985 Census less large employers

g= From C.O.S.(1986), Tables 31 & 32 (professional & technical cadres combined).

h= Three persons each from Malta's largest enterprises-see Note a above

i= No. of establishments with less than 20 employees- (C.O.S., 1990, p.200)

j= From C.O.S.(1986), Tables 31 & 32 (administrative & managerial cadres combined)

k= An estimate, but keeping in mind membership within the GRFU (3,200 in 1992/93: *Government Gazette*, 24th Nov 1992, p.5732.)

l= An estimate based on half the self-employed population - includes about 3,000 farmers: Delia (1990,p.7).

m= September 1992 figure, from *Economic Trends*, monthly bulletin. n= Non-working housewives, taken as 90% of non-participation rate of women (i.e. 100-30%=70%). Such housewives may be seen as thriving on the transfer payments of their husbands. 86% of husbands are taken as being employees. A figure of 6,000 is deducted, to take into consideration part-time females -see Note o below.

o= Official statistics on female part-time employment levels

p= Corresponds well to 1990 population projection of 219,000 in the 15-59 age category: C.O.S.(1986, Table 22, p.266).

BOX B: An Occupational Class Map of Malta

Occupational Status	Number Males	Females	Total	(%)
Employers	2148	10	2158	2.1
Own-Account Workers	9653	1042	10695	10.2
Employees classified as:				
-professional, technical and other related workers, qualified professional scientists, doctors, dentists, architects, engineers, surveyors, qualified marine and aviation workers, university academic staff, qualified teachers, systems analysts, computer programmers, lawyers, accountants, members of religious orders, artists, librarians, qualified social workers, nurses, other paramedics:	5658	2448	8106	7.7
-administrative, managerial and other related workers, consular staff, directors, police officers:	4996	510	5506	5.2
-executive, clerical and other related duties, including bookkeepers, postmen, salesmen, tourist guides, supervisors and draughtsmen:	13810	6419	20229	19.2
-skilled and semi-skilled workers including Group D government workers, machine operators, shop assistants and catering workers:	29071	7850	36921	15.1
-unskilled workers	15102	6417	21519	20.4
Grand Total:	80440	24853	105293	100%

the men (and some women) "who affect the political, religious and social life of the country", this after having been duly screened and ascertained by "knowledgeable persons" (*ibid.*, p. ix.). Funnily enough, behind this facade, as it were, it may be a totally different kind of acumen - business, coalition building, risk hedging, role multiplicity - plus ascribed criteria such as the accident of birth (including gender) or marriage - which suggest themselves as more powerful explanations for the nature of the Maltese contemporary social class structure and of one's relative position therein.

Conclusion

The thread of my argument is, that irrespective of whether one adopts a social class perspective which ascribes primary causality to the configuration of economic power or to market and status manifestations, the extant Maltese socio-economic, cultural and political formation and its historical legacy suggests relevant class conceptualisations which depart from any ready made framework. As has been described with respect to other small and peripheral nation states, the inability to control and determine one's own economic development trajectory may be understood by the relative lack of social classes in the structuralist sense. The *a priori* primacy of production must therefore be questioned, and the greater relevance of other social cleavage factors seriously entertained (Duncan 1980,p.5).

Implications on educational policy and im-

puted outcomes have been introduced above to ground some of the powerful implications of revised conceptualisation. I leave these as tentative but studied seminal remarks, possibly a spur towards further illuminating and revisionist empirical research.

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Popular Education and Social Transformation in Nicaragua

Peter Mayo interviews Maria Zuniga,
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Nicaragua has captured the imagination of several educators and other cultural workers striving for social change because of the many initiatives in transformative popular education carried out in the country before and, most particularly, after the Sandinista-led revolution of 1979. The most important initiatives were the Literacy *Cruzada*, carried out soon after the revolution, and its sequel, the popular basic education programme (EPB)¹. Important popular education initiatives were also carried out in the area of health education. Maria Hamlin Zuniga has been involved in primary health care programmes in Central America since 1968. She is a founding member of the Regional Committee for the Promotion of Community Health and the International People's Health Council. She is presently the Director of the Nicaraguan NGO, *Centro de Información y Servicios de Asesoría en Salud* (CISAS). In this interview, which took place during her visit to Toronto in 1991, Maria Zuniga draws on her first hand experience of popular education in Nicaragua to discuss some of the issues related to the field.

MAYO *In your view, to what extent did popular education help change social relations in Nicaragua after 1979?*

ZUNIGA The whole philosophy of popular education, in Nicaragua, is not that of one person being a teacher and the other person a learner but of people learning together and building a new society, transforming structures from the old to a new and just society. The popular education movement in Nicaragua was therefore extremely important leading up to the revolution but especially after the revolution. Of course, the first experiences centered around literacy training. It was literacy training that helped people to understand a history that had been kept from them. This consisted of a history of the struggle for liberation - how it began, in the times of Sandino. Revolutionary words and revolutionary processes were used

as generative words in the literacy training for adults and also in the instruction of children. People were helped to understand the meaning, then, of their history, their culture and to build from that to create a more just society. People were helped to understand this. We worked with them to help them create new ways of going about doing things, to enable them to realise that they had something to say first of all, and that they had a right to speak out. It involved a process of reciprocal learning. Persons working on literacy training, for example, but who never lived in the countryside with peasants and were, for perhaps the first time, going out and sharing experiences with a peasant family, were learning from that family the things that they could teach. And so the educational process involved was a two way one and was not restricted to the literacy that the young person was teaching them. It involved the entire experience of many people coming to know one another and learning to respect one another. This brought about a change in the society. There wasn't the kind of separation whereby city people felt they were different from country people or country people felt that they were inferior to city people because they had less education. City and country people shared this experience and learnt from one another. I think this was terribly important in all the processes of popular education taking place in Nicaragua under the Sandinista government but certainly at the beginning, during the *Alfabetización*, the literacy crusade.

MAYO *A question which arises concerns the role of popular education prior to the revolution. Did it help generate the right climate for a revolution?*

ZUNIGA Well, I had to leave Nicaragua in 1975. Because of the work that I was doing on the east coast, I was asked to leave the country. One of the things that we were doing was working with people in what we call *consentización*. This involved raising awareness of what people's rights were.

People always knew they had responsibilities but many people did not know that they had rights or that they could demand from their government or the authorities certain kinds of services, for example. And so I think that those who were working in the early literacy programmes, those who were working with cooperatives, those who were working with the Indian people, as we were, on the east coast of Nicaragua and those who were doing *conscientización* in general, were helping people become more aware of the fact that they had something to offer, that they were important as individuals. The idea of human dignity was being conveyed. There was also the idea that, because one has human dignity, one can go on and make demands. And people began to do that. This kind of work is, of course, subversive. And people who worked in popular education, in the area of *conscientización*, before 1979, were certainly viewed as being subversive because they were leading to the Revolution. All those education programmes were seen by the people in government as dangerous to them. So such action was obviously important to the Revolution or there wouldn't have been attempts to repress it.

MAYO *Your constant references to 'conscientização' immediately brings to mind the work of Paulo Freire, a leading figure in the popular education movement in Latin America, although I understand that the 'conscientização' movement started well before Freire. A question which comes to mind is: Where and When does Freirean pedagogy work? Does it work in a process of cultural revolution, as was the case in Nicaragua after 1979, when it was promoted by a government seeking to create social relations on the lines advocated by Freire? Alternatively, does it work better in a pre-revolutionary situation, in the context of what Freire would call 'cultural action for freedom'? The Nicaraguan experience provides an answer to the second question. It may have taken a guerrilla movement to effect the final change but the actual process of struggle was a long drawn out one, which involved other movements, like the popular education movement you have just described.*

ZUNIGA Yes. Well, I don't think that one must have a revolution to be involved in Freirean kinds of *conscientización* and popular education. I think that it can be applied in many different situations where one is looking or hoping for social change. We are not going to have revolutions in Canada, for example, or we are not going to have revolutions in the United States, but there are moments when the kind

of process that one goes through with popular education can be very important. It can be very important to particular groups of people in their particular moments in bringing about conscious social change that will lead to permanent kinds of transformation in the society. I believe that this is possible. Of course, that's revolutionary in a small sense. I am not talking about societies and overthrowing governments but overcoming injustice in particular kinds of situations. So yes, I think it can be applied in different contexts. I think it can be applied in neighbourhoods. I think it can be applied in cities, in factories, in different kinds of situations where people find themselves, notably in structures which are unjust and need to change. One can find it in the university - consciousness raising in the university to bring about changes in the curriculum, to bring about changes in the way classes are done. And that wouldn't be revolutionary in the sense of an armed revolution but many of the principles can be applied to our everyday situations. In fact, this is one of the reasons why I am here in Toronto. I am trying to share with people what we do so that they can learn to apply it to their particular fields, whether it be health education, nursing or the students that are in the classroom.

MAYO *What you're saying is that, although it has a Latin American ring to it, conscientisation is not context specific. It can be applicable elsewhere.*

ZUNIGA Yes, I believe that it can. I think that it came at a moment in Latin American history that was very conflictive. It came too at a moment when many people within the Church were talking about a theology of liberation from oppressive structures. And so the two came together and made it very important. An explosive mix, if you will.

MAYO *Many of the Brigadistas who acted as facilitators in the Nicaraguan Literacy Crusade were young students, some of them from the urban centres who moved into the rural areas in a process intended to bring together country and city and therefore to provide a sense of 'national popular unity'. How successful were they in carrying out a pedagogical practice on Freirean lines? Given their age and inexperience, was there a lot of 'Banking Education' going on?*

ZUNIGA Well, I think there are two ways of looking at it. Certainly, 'Banking Education' happened and continues to happen and it is done by people who call themselves popular educators. But I think one of the advantages was that many of the

people were young people and so they were open to doing things differently. They weren't teachers. They were students themselves. They were young people. They were going out to a new kind of situation. Unlike peasants, they didn't have the skills to live out in the countryside. And so literacy workers and peasants were actually forced to learn to live with one another. And you can imagine what it was like for the peasants to have these city persons come out and live with them, attempting to live a peasant's life. They would laugh at them and make fun of them because they didn't know how to do certain things. The literacy workers weren't used to washing their own clothes and perhaps did not have the conveniences that they would have in the city and in their homes. The process involved both literacy workers and peasants getting to know one another and sharing, without all of these preconceptions of how it should be done, because neither had the experience of having been with the other. I think where you start having difficulty is as people start getting older, as they get more set in their ways. If they've been teachers, the tendency would be to teach the same way. And so in the workshops that preceded the literacy training, people learnt new teaching skills and, because they didn't have old teaching skills, ongoing experiences of teaching, they were able to change more easily than persons who had been teachers, who had their ways set and had to adapt to a new process.

MAYO *The former Nicaraguan Literacy Crusade Coordinator and Minister of Education, Fr. Fernando Cardenal, is on record as having said that it is only now that Nicaragua is beginning to move away from 'Banking Education'. What is your reaction to his statement?*

ZUNIGA With the Revolution, there was a tendency to institutionalise popular education. It was done in the educational system. It was done in the health system, in health education, whereby people at ministerial levels, made decisions about what it would be that people would learn and how it would be that they would learn. They would talk about popular education. But if popular education comes from where people are at and what their needs are and what they want to work on, then we can say that the idea of the orientation from above was not 'popular education'. We may have gone through a lot of the motions of popular education, a lot of the methodology of popular education, but the very idea of developing a programme from the base instead of from above was often not taken into account. And I

can speak more clearly about health in this case. For example, in the popular health campaigns, we would be working on the importance of vaccination and trying to get everybody involved in the vaccination campaign. And we would develop materials at the national level with a view to carrying out workshops at the regional levels and at the local levels. This would involve a process in which we would work on these materials together, explain how they should be applied to the base levels, to the community levels and this, in itself, is the antithesis, if you will, of popular education....which is one of the problems that I felt in my work. I felt that, many times, our teaching and educational work was 'top down' and people would say 'well, what is the orientation from above?' And this happened in many, many ways during the Revolution....the whole idea of the *Dirección Nacional*. The people followed the directorate instead of saying 'we're going to make the decisions here and communicate them above'. This became much more difficult during the war years. It was a military kind of reaction instead of a 'popular education' kind of reaction. But that is not to say that, at the local level, people weren't able to apply principles. However, if people are used to taking directions, sometimes they don't want to be flexible with respect to the application of the things they were learning. So if we developed a plan for a workshop at the national level, many times people wouldn't make those adaptations but, in other places, they were creative enough to realise: "Well, this comes from above but here our situation is different and so we are going to have to work on this problem first because that's what our people are demanding of us" But not everybody is creative or flexible.

So Fernando says today we have more possibilities and that's because those of us who are doing popular education are no longer in power. We really have to relate more to the base and that's where we're coming from now. When Daniel Ortega said the Frente Sandinista would rule from below, therefore promoting the idea of organising and mobilising the population to make demands on the new government, he advocated a process which is much more 'popular education' oriented than was the case when the Sandinistas were in government.

MAYO *During the Contra War, a lot of popular educators lost their life. Many of them were the target of deliberate attacks. Were there any casualties in the area of community health education, the area in which you worked?*

ZUNIGA Oh yes. As I already stated, both health and education were attacked by the counter-revolution, especially at the beginning of the War in 1982 and in 1983 and 1984. Many people who were *Brigadistas* or were popular educators or popular health educators were a target for the counter-revolutionary forces. Popular education and popular health programmes were the first and most important ones of the Revolution. Maybe people didn't see land reform or didn't see housing development or the provision of jobs as products of the Revolution but they did have popular education, they did have the literacy training, with new schools being established later on. There was the extension of health services to the entire countryside, even to the most remote areas, with the establishment of health posts and the extension services. So, being against the Revolution, the counter-revolutionaries would attack those forces, those persons, that extend the Revolution to those remote areas. And so the first people who were attacked were the teachers and the health workers. And many health workers disappeared, or were killed, as were teachers. They were kidnapped and never found. Some were taken away to the Contra camps and others were killed. I can't remember how many casualties were suffered but there were many victims among those kinds of workers.

MAYO *Did you experience such a risk?*

ZUNIGA Well, I didn't work in a conflictive area. Our offices are in Managua and we did work in the countryside, especially the North West region of the country. On one particular occasion, the truck that I was driving was attacked by counterrevolutionary forces on the Northern Border of Nicaragua. It was just harassment of the vehicles to frighten people away from that area. So I was never subjected to great dangers but people with whom I work certainly were. People who worked in the regions of Esteli and Nueva Segovia or Matagalpa or Jinotega were certainly, almost on a daily basis, subjected to conditions that were extremely difficult and stressful, living with constant counter-revolutionary attacks. And a very close friend, Benjamin Linder, was assassinated by the counter-revolution when he was working to build a hydroelectric plant in the Northern part of Nicaragua. So I was touched by many deaths of Nicaraguan people and many sons of women who are my friends - sons who went off to war. I am also personally touched by the deaths of people who were personal friends of mine. Nobody in Nicaragua has been untouched by the War because some people had

relatives who joined the counter-revolution. Others had relatives and family who were in the *servicio militar*, the compulsory service for young people. So, in that way, we feel that there isn't a family that wasn't, in one way or the other, touched by the War. And that's why so many people voted for Dona Violeta (Violeta Chamorro), for they were voting against the war, voting against the idea of their sons and, in some cases, their daughters, going off to war.

MAYO *Part of the problem facing the Sandinista government in implementing programmes of popular education lies in the fact that a civil war was going on. This government also had to survive in a competitive, Capitalist economic environment. As Martin Carnoy and Carlos Alberto Torres have indicated, in a study on education in Nicaragua², the Government faced the pressure of having to accumulate capital and, at the same time, to spread its sense of democracy and legitimise itself in the process. How true was this conflict, in your view?*

ZUNIGA How true was it? It certainly is true now! I would say that it was true also in the revolutionary process. There was a conflict between what is popular education and formal education. It was the idea that I spoke of earlier, where the orientation was 'top-down', so you would get the same thing in the formal education structure. Now, within formal education, you can use popular education techniques but, if you have a programme that's handed down to you, although the content of that programme and part of the methodology can be very democratic, the way the teacher imparts the knowledge can be very *anti-popular*, if you will. I think that there are very good formal education teachers that have the required ability and flexibility. Remember that, in Nicaragua, before 1979, the vast majority of the population was illiterate and so you are suddenly expecting people to take on a philosophy and take on new positions in the society without the proper preparation for them. So you will work fast to get somebody trained to do something and that will be formal education. Then you would be expecting them to apply this to non formal education, or do adult education in a way that was different from the way that you were training them. And so there was a lot of this kind of contradiction. I experienced this all the time, with people are in the health field. We are preparing practical nurses, nurses who have a one year training programme in the field and their training programme is hospital oriented. There are doctors' orders regarding what they should do. That's the way their training is. But then, where do you put

them? You put them in a health post in the countryside and they are the persons who are responsible for running the health post. However, they are not prepared. And so I think that there was a lot of this. We don't always prepare people for the roles that are expected of them in a more democratic society. We prepare them in a very dogmatic way and then expect them to adjust and be flexible, and we haven't given them those skills in their own training programme.

MAYO *Has there been an attempt to deprofessionalise the process of disseminating knowledge in post-'79 Nicaragua, at least in the area of popular education?*

ZUNIGA I certainly think so. I think it should have gone much further. But certainly there has been that idea. Remember that most professional people left Nicaragua and so you have a young inexperienced population that very quickly has to take on major responsibilities. That's why a lot of mistakes were made. The mistakes were made by people who weren't prepared professionally. Maybe that was good because, at least, people were willing to take on responsibilities and wanted to do a good job when they were given those responsibilities. And they would try to learn to do a better job, to develop the skills that were needed for the job. So you'd have some people who had very little formal education and very many workshops and seminars that prepared them for the work that they do. And many of those people are much more capable than somebody who has been sitting in the university for years and learning it through books, because they have the 'hands on' experience, they've had practice, they've made mistakes, they know how to go about it. At the same time, it means that you have a professional level that can be deficient. I have been concerned about the people who are working in the medical field because if I compare what a medical student might have here at the University of Toronto's Medical School, in terms of practical possibilities and facilities, and what we have available for our medical students, by far those who have been at the University of Toronto have a greater opportunity to learn in that respect. But they don't have the opportunity to have lived through a revolution, to have been involved in literacy training and to have been involved in the war and to have come out of that with a whole new idea of what society is. Sometimes we have in mind that, in order to be a good professional, you have to have all the things mentioned earlier and we don't have all those things but we can learn to ask the

right questions or know where we need to ask questions or look for more information. But it's a very difficult situation when so many people have to take on responsibilities and do not have the opportunities to prepare themselves.

MAYO *The whole notion of being a popular educator, or, more specifically, an educator in the way Freire understands the term is, in my view, antithetical to the notion of THE PROFESSIONAL - the one who knows best what is good for you.*

ZUNIGA I want to make a distinction between a medical doctor and people who are community based health workers. In my whole professional life, I have been trying to promote the idea of community based health workers, precisely because doctors may have scientific knowledge but what they often lack, if they are not from the particular community, is the cultural sensitivity, the understanding of the society or the ethnic group or whatever it is with whom he or she is working. And most of the time, professional people have developed a shell, if you will, part of which is their professional composure, their white coats, their language, that separates them from the people and makes people respect them and fear them. There is also the fear of asking questions because people do not want to appear to be ignorant. As for the community based health workers, they know where they live. They've got a family. They speak the same language. They have the same customs and they can solve their problems together. And so, for most of us who are working in the field of community based, people centered health care, we are more concerned with providing knowledge, on an understandable basis, to a large group of people rather than spending time and effort and resources in preparing very few people at a highly professional level. Because most of the problems that we have in developing countries are problems that can be solved through education and community organisation and are not dependent upon anti-biotics. Most of our problems don't need anti-biotics. They need social change.

MAYO *What is the impact of mobile global capital on the kind of social programmes introduced by the Sandinistas?*

ZUNIGA Most of the social programmes of the Sandinistas are suffering greatly today because of the change in the government, the requirements of the international lending banks and the requirements of such governments as the US government, on making these famous 'structural adjustments'. And

'structural adjustment', although it sounds very good - it sounds as though you're changing structures - creates problems since what you're really doing is taking away from people the possibility to carry on with some of the most basic functions in their lives. You're taking away from them their educational services, their health services, their day care and social services, pensions for the elderly, care for disabled people - all of those services that make life, make living, more possible for the majority of the people. And it's very disturbing because it is all talked about in such inhuman terms. However, all of that happens on a very human basis. So what we see is, in a very short time, levels of poverty - poverty in many senses of the word, not just capital. People are really disturbed because, for example, if you have a family of young children and you did not have the opportunity to have an education and your children had started to have that opportunity, as simple as that education might be, then you will feel that this education must go on. The people would have hopes that their child can be in secondary school and can go on to the university and then, all of a sudden, these programmes are being cut back, substantially, and people have to pay to go to school. They have to pay for their books. They have to pay for their health services - these services which people regarded as their rights and what we call the 'conquest of the revolution'. People did not vote for the new government to have those removed and it's quite disturbing to people. Structural adjustment sounds like a very reasonable combination of words. It sounds alright. But when you start putting human beings into these structures, you realise that it's eventually going to lead up to a very explosive situation throughout the world because it's simply increasing the gap that exists between the rich and the poor. What we now discover is that the middle class is becoming poor and so the situation today is much more divisive than was the case with poverty in the past when we didn't have a middle class and we didn't have people with so many expectations.

MAYO *It's a bleak scenario. Are there possibilities for change?*

ZUNIGA There are a lot of people who are hopeful. Of course, the way out, at the present time, is not through armed revolution. What we talk about a lot, in Central America, is the whole idea of *concertación*, of the different social actors and social forces in the community coming together because, if the wealthy are reasonable, they will realise that, unless there is some way of people working together

and having certain kinds of possibilities for a better life, the situation will become so explosive that they are not going to be able to maintain their wealth and their power. And so those who have wealth and power must sit down at the table with the other social actors and try to bring about reasonable social change. And that's what happening in Central America. There's a lot of what we call *concertación*. There are many social actors. The government, business, private industry, social forces such as unions and political parties are sitting down together. It's not the way they've solved problems before. So it takes a great deal of understanding to do things this way and there are situations which I think can be quite explosive. We have situations of social unrest in Nicaragua but they are localised reactions to pressure. One would hope that people could reason together over a table. And I think that military leaders and the very wealthiest Latin Americans and the younger people are aware that they can't continue to be killing people, to massacre people as they have done in the past because, in the world society today, those things cannot continue to go on. And so they, at least, have to try to present a more reasonable face. But it's very, very difficult. It's very difficult for people to stop because they haven't done that before. Force has been used against people and not reason.

MAYO *I'd like to shift the discussion to an analysis of the role of social movements. There has been a lot of talk about mass popular organisations being accorded a big say in the running of the country by the Sandinista government. Were they perceived as the more likely agents of social transformation?*

ZUNIGA Oh I would say so! Yes, the mass organisations had members at all levels of society and all levels in the city and the countryside: the Workers, the Agricultural Workers, the Factory Workers, the Teachers' Union, the Health Workers' Union. Those were important social actors at the time of the Sandinistas. But they were very SANDINISTA and so, now, with the change in the Government and certain discontent on the part of people in the mass movements, you see, for example, the Federation of Workers taking a much more radical stand than the party itself. Whereas, during the time of the Sandinistas, there was a close relationship between the party and the State, now the party is out of power. It is no longer the State and the workers now have a more radical point of view than the party itself. And some people say "Can't the party control those?". No, because the mass organisations, all

those people, don't belong to the party. The party cannot say you do this or do that because the organisations have a broader base than the party itself.

And now what's happened in the women's organisation, for example, is that, whereas during the time of the Sandinistas, there was one major women's organisation, there is now what we call the Women's Movement and, in the Women's Movement, there are different organisations and no single organisation is in the vanguard. And no single organisation can say that it speaks for all women. And we have a coordination of groups that work with, for and are of women. And, at any given time, we might be able to have twenty or twenty five different groups working together. We have a Movement of the 52%. 52% of the population are women. And the members of the 52% are different groups that have their own particular point of view and ways of working. But they come together to discuss basic women's issues and they don't feel that one organisation represents them. There is a recognition that women have many interests and that they should be able to organise around their particular interest. But there is a sense of gender and so the movement is a women's movement but it is not the kind of organisation that it was seen to be during the time of the Sandinistas. So many things happened after the elections .

MAYO *Of course, there are other movements, such as the Lesbian Movement. Is it very powerful?*

ZUNIGA Well no, it's not powerful. Although it is small, however, it can come out and be a social force. That didn't happen before 1990. It happened after the Elections. It happened basically after March 8 of 1991. They are one of the organisations that make up the Movement of the 52%.

MAYO *What about the other powerful sector in Nicaraguan and Latin American society - the Church? Now we tend to think in terms of two churches in this context, what Freire calls the 'modernising church', very much associated with the upper echelons of the hierarchy, and the 'prophetic church' which is the one that is very much into Liberation Theology. How strong and how influential is Liberation Theology still in Nicaragua ?*

ZUNIGA I think the basic christian communities have suffered a great deal in the last few years. The basic christian communities were extremely important during the pre-revolutionary times and at

the time of the Revolution. But today there are other powerful forces working in the community. One is the modernising church, as you put it, namely the hierarchical church. This church is characterised by its possession of a great deal of money and resources and a social plan. Besides that, there are the Evangelical churches. There is an attempt to evangelise. Some of that is led from North American sects that are putting a great deal of money into Nicaragua. Others are the more prophetic, evangelical churches who have a base in Liberation Theology. And all over Central America, there is a plan to reduce or eliminate the power of the popular church. However, there are moments when you see the upsurge of the popular church and the people's response. A typical example was the reaction to the death of the Jesuits in El Salvador. But I think that most of the people who are in the popular church in Nicaragua are closely identified with the Sandinistas. A sense of anguish and sorrow surrounded the defeat of the Sandinistas and the change in the social programme, and, in some cases, one notices a sense of desperation in trying to look for hope in this new situation. But almost daily there are reactions to the kinds of pressures that are being put on society. We didn't have social problems related to drugs or street violence. Of course there was the war, but there wasn't so much theft and assaults. Now that has become a daily occurrence and people don't know how we're going to come out of this. We really don't know how we're going to come out of this. There are moments of reaction in the society and then things calm down again because people do not want to have a civil war. But there are retreats and forward movements and church people are caught up with this. And some people have a crisis of faith because they don't believe in the hierarchical church. They don't believe that it's right for the Cardinal to be building a three million dollar cathedral when there is extreme poverty fifty yards away from where he's building this cathedral. This is the kind of contradiction they are attempting to grapple with. So, where is it that we're going to go? I don't know. I think that we are in very troubled times. But people do have hope that some day things will be better.

MAYO *What about the Liberation Theology movement throughout Latin America in general? Is it still powerful?*

ZUNIGA I think that it's powerful among the people who are part of the Christian communities but because Christian communities are small communities working together, that's where they find

their Church and not in the institutional church. And so because it's here and there and is not big, it doesn't have big buildings, it is hard to measure its force. But I believe that it is still there in many places in the faith and the hope of small groups of people working for something within their possibilities. It is present among people looking for justice in their neighbourhood or community. It doesn't have the spokespersons or the attention. I mean somebody like Monsignor Romero brought what was happening in the popular church to people's attention every week and it had publicity. Today there is not so much publicity. But I feel there are strong Christian communities still working today.

MAYO *How great was Freire's influence on you in your role as popular educator?*

ZUNIGA I would say that it was extremely important to me to have had the experience, first of all, to be involved in what is called *conscientización* and then study about it more theoretically after having been involved in the practice. It was equally important to discover that this is something that I really wanted to learn more about and become better at in my own work in health and to look for ways to apply specifically those kinds of theoretical frameworks to the health field. So I came at it not from a theoretical base and wanting to go out and do it but from the popular base and in accordance with the needs of the people. I was looking for a theory with which I could identify at critical moments in my life. I could see what it did when I was working with the people. I learnt a lot from the people by the decoding process. We learnt together and I discovered the process to be quite exciting. So Freire did influence me. So did the people around me who knew Freire. These are people who don't have the name that he does, but who exerted a great influence on my life. And there are many situations in which I wish I could apply much more Freirean theory but what happens

in the world today is things occur so fast and to do that kind of teaching you need time.

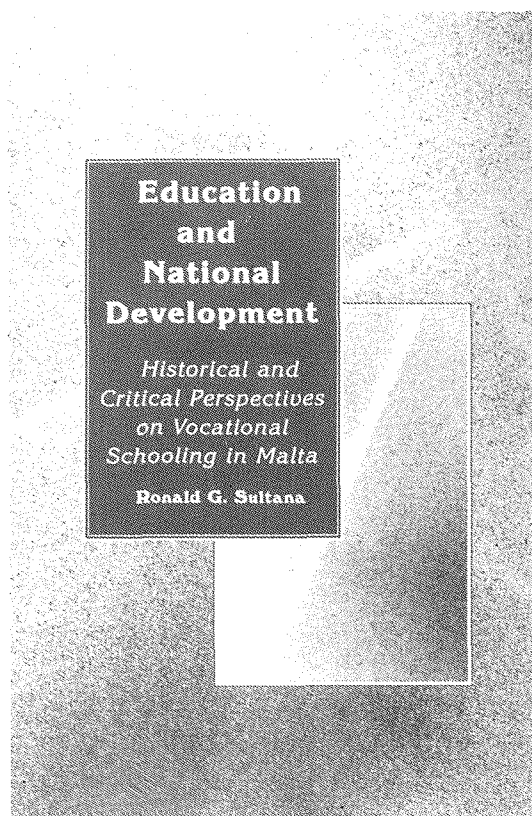
Notes:

1. For an excellent account of these initiatives, refer to R.F. Amove's *Education and Revolution in Nicaragua*, N. York: Praeger, 1986.
2. Camoy, M., Torres, C.A. (1990), 'Education and Social Transformation in Nicaragua 1979-1989' in Camoy, M, Samoff, J., *Education and Social Transition in the Third World*, N. Jersey: Princeton University Press.

Book Review

Education And National Development: Historical And Critical Perspectives On Vocational Schooling In Malta, Ronald G. Sultana. 494 pages . Malta. Mireva, 1992. ISBN 1-870579-12-7.

This is a most impressive study of the historical, social, political, and economic issues related to vocational schooling. While its title may perhaps suggest a book of mainly local interest, it provides in fact a sustained analysis and critique of vocational schooling that should be studied with close attention much further afield.



The book is arranged into two major sections. A discussion of historical changes and continuities in vocational schooling in Malta since the early nineteenth century occupies more than half of the volume. Sultana then shifts his attention to the problems of the recent initiatives in the area since the 1970s, before going on to suggest possible scenarios and a preferred outcome for future policy. But despite the separate construction of "historical" and "critical" perspectives, one of the most important strengths of Sultana's book is in its portrayal of how an understanding of the history helps us not only to interpret

current issues, but also to address them more effectively. The setting up of vocational schools in 1972 thus becomes "the most recent turn of a 'story' which had its roots in the nineteenth century" (p. 21). Historical analysis also serves to highlight the wider relationships of vocational schooling in Malta, such as "the economic battle to eke out an existence from what is ultimately a barren rock, and the often related vicissitudes suffered under foreign rule" (p. 26).

The interplay between the "national" and the "comparative" is another feature of the book that works very well. The Maltese experience is examined in depth partly for its own intrinsic value, but no less so for its relevance to a more general understanding of vocational schooling. Sometimes this relationship between the particular and the general is conceived in terms of providing an example of universal truths. Indeed, Sultana goes so far as to argue that "The Maltese case study will be a timely reminder that, irrespective of the good intentions behind any vocationalising scheme which sets out to provide relevant schooling, the results will very likely be the same as in Malta namely, the creation of lower-status tracks and/or schools for low status students who will be offered an inferior, diluted form of education which will lead to the reproduction of social inequalities from one generation to the next." (p. 10). This sounds somewhat over-determined, an iron law of vocational schooling as it were, but Sultana still finds room for effective contestation. At other times, the comparative aspect is seen in terms of Malta constituting a "test-case" for broad theoretical formulations, for example on the importance of vocational schooling for the economy, or for individual moral benefits, or for social transformation.

Particularly appropriate in a book about vocational schooling is an awareness of both theoretical and practical dynamics. Sultana shows a strong grasp of theory relating to vocational education, but is also able to apply this to everyday encounters in schools and classrooms involving teachers and pupils. This comes out especially well in the second section of the book. The methods used in the work shift markedly to suit this changed emphasis. Whereas in the first section intelligent use is made of a range of documentary sources (primary and secondary evidence and

thesis material), in the second section recourse is made to questionnaires, interviews, tracer studies, and action research. Indeed, it is this wide range of research methods and sources, just as much as its theoretical scope, that helps to make this book such a useful and important study.

The concluding discussion about policy implications also makes an interesting contribution to a wider debate. Although Sultana is sceptical of the value of separate technical schools for specific groups of students, he argues against excluding "vocationalism" from the curriculum (p. 13). He proposes therefore that vocational education should be developed as part of a compulsory core curriculum, and invokes the ideals of John Dewey as a guiding inspiration towards this end. At a time when national curricula are in vogue, this insistence on vocational education as an integral part of such a curriculum needs to be taken up and explored further in developing a comparative framework for this general policy trend.

There is much to argue about in this book. Sultana's perception of the English experience in technical education, as reflecting "belief in free enterprise, the spirit of initiative, and the march of technological progress" (p. 71), seems dubious when one recalls criticisms of the anti-industrial ethos of so much of English education. The tight fit suggested between periods of economic depression, and initiatives in vocational schooling, may also be open to dispute. But such debates are a continuing feature of the field. *Education and National Development* constitutes a notable contribution towards our understanding of vocational schooling in Malta and elsewhere.

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Notes on Contributors

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Godfrey Baldacchino has completed his Ph.D. studies at the University of Warwick, England, where he presented a doctoral dissertation on labour relations in small states. He is presently research officer at the Workers' Participation Development Centre and visiting lecturer at the Department of Public Policy, University of Malta. Dr. Baldacchino has published widely in the fields of industrial relations, workplace democracy and education. Articles of his have appeared in *Development and Change*, *Hyphen*, and *Economic and Social Studies Journal*. He is the author of *Introducing Social Studies* (PEG, Malta, 1988), *Worker Cooperatives with Particular Reference to Malta* (The Hague, Netherlands, 1990) and co-editor of *Maltese Society: A Sociological Inquiry* (Mireva, Malta, 1993 in press).

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