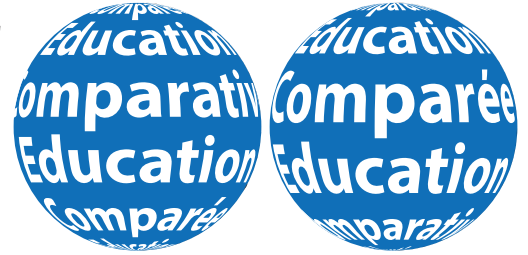


Global Comparative Education

Journal of the

World Council of
Comparative
Education Societies
(WCCES)



Lore

Éducation Comparée Mondiale:

Revue du Conseil Mondial des Associations D'Éducation Comparée

Educación Comparada Global:

Revista del Consejo Mundial de Sociedades de Educación Comparada

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The *Global Comparative Education* is an open-access, peer-reviewed journal that aims to contribute to the comparative education literature by creating spaces to present critical analyses of the differences and commonalities within education worldwide (formal, informal, and non-formal), with an explicit focus on increasing and widening social justice globally, keeping in mind that for instance UNESCO to which WCCES is affiliated declared education a human right more than half a century ago. The Journal welcomes article submissions in the six UN languages: Arabic, Chinese, English, French, Russian, and Spanish.

The Journal seeks articles that are diverse in numerous aspects and perspectives including, but not limited to: theories, methodologies and methods, pedagogical practices/tools/resources, policies, and scope/nature of comparison (e.g., geographically, culturally, linguistically, economically, historically, and population (gender identity, race, ethnicity, sexual orientation)) and any other grounds of differentiation as they relate to educational processes, especially with comparative perspectives. Special focus will be given to providing space for historically under-represented areas of comparative education and transfers of knowledge (e.g., Global South to Global North). *Global Comparative Education* is the official journal of the World Council of Comparative Education Societies (WCCES).

حول المجلة

التعليم المقارن العالمي هو مجلة مفتوحة الوصول إليها من قبل الأقران التي تهدف إلى المساهمة في أدب التعليم المقارن الرسمية (من خلال خلق مساحات لتقديم تحليلات نقدية للاختلافات و القواسم المشتركة في التعليم في جميع أنحاء العالم وغير الرسمية)، مع تركيز صريح على زيادة العدالة الاجتماعية وتوسيع نطاقها على الصعيد العالمي، مع الأخذ في المقارنين أعلنت أن التعليم و التربية مجتمعات لمختلف العالمي الاعتبار أن اليونسكو التي ينتمي إليها المجلس وترحب المجلة بالرسائل المقدمة باللغات الست للأمم المتحدة: العربية. حق من حقوق الإنسان منذ أكثر من نصف قرن، الصينية، الانجليزية، الفرنسية، الروسية والإسبانية.

وتسعى المجلة إلى مقالات متنوعة في جوانب ووجهات نظر عديدة منها على سبيل المثال: النظريات والمنهجيات الموارد والسياسات والنطاقات / طبيعة المقارنة على سبيل المثال: / والأساليب والممارسات التربوية / الأدوات وأية أسس أخرى للتمايز (جغرافيا، وثقافيا، لغويا، اقتصاديا، تاريخيا، وديمغرافيا (الهوية الجنسية، العرق، التوجه الجنسي). وسينصب تركيز خاص على توفير حيز للمجالات. من حيث صلتها بالمناهج التعليمية، وخاصة مع المنظورات المقارنة (التعليم المقارن) ذات التمثيل الناقص في مجال التعليم المقارن ونقل المعارف (مثل الجنوب العالمي إلى الشمال العالمي). العالمي هو المجلة الرسمية للمجلس العالمي لجمعيات التربية التعليم المقارنين

关于期刊

《全球比较教育》是一本公开、经过同行评论的杂志，目标是通过呈现对世界教（正式的、非正式的、和不正式的）异同点的批判分析，促进比较教育文献的发展。特别是由于比如 WCCES 附属其下的联合国教科文组织 (UNESCO) 在半个世纪之前就曾宣告过人权，所以本期刊尤其会着重分析日益严重、影响范围扩大的全球性社会公平问题。本杂志欢迎以下六种联合国语言提交的文章：阿拉伯语、中文、英语、法语、俄罗斯语、西班牙语。

本杂志寻求在诸多方面与视角多样化的文章，包括但不限于：理论、方法论、教学法的实践/工具/资源、政策、比较的视野/本质（比如，地理地、文化地、语言学地、经济地、历史地、人口地（性别身份、民族、人种、性取向），以及与教育过程，特别是比较教育视角之下的问题有关的其他差异之处。特别关注历史上被忽视地区的比较教育和知识交换（比如，南方世界和北方世界）。《全球比较教育》是世界比较教育学会联合会的官方杂志。

A PROPOS DE LA REVUE

Éducation Comparée Mondiale est une revue accessible et évaluée par les pairs ayant pour but de contribuer à la littérature relative à l'éducation comparée en offrant des espaces pour présenter des analyses critiques des différences et des similitudes au sein de l'éducation (formelle, informelle et non formelle) dans le monde entier, en mettant un accent explicite sur le renforcement et l'élargissement de la justice sociale à l'échelle mondiale, tout en mettant l'accent sur le renforcement et l'élargissement de la justice sociale à l'échelle mondiale, et en gardant à l'esprit que, par exemple, l'UNESCO à laquelle WCCES est affilié, a déclaré l'éducation comme un droit de l'homme il y a plus d'un demi-siècle. La Revue accepte des articles présentés dans les six langues de l'ONU: l'arabe, le chinois, l'anglais, le français, le russe et l'espagnol.

La Revue recherche des articles variés dans de nombreux aspects et domaines, y compris, mais sans se limiter aux: théories, méthodologies et méthodes, pratiques / outils / ressources pédagogiques, politiques et la portée / la nature de la comparaison (par exemple, sur le plan géographique, culturel, linguistique, économique, historique, et démographique (identité de genre, race, origine ethnique, orientation sexuelle)) et tous autres sources/ problématiques/questions de différenciation en ce qui concerne les processus éducatifs, en particulier avec des perspectives comparatives. Une attention particulière est accordée aux régions historiquement sous-représentées en éducation comparée et aux transferts de connaissances (par exemple les pays du Sud et du Nord). Education Comparée Mondiale est la revue officielle du Conseil Mondial des Associations d'Éducation Comparée (CMEAC-WCCES).

О ЖУРНАЛЕ

Всемирное Сравнительное Образование - это рецензируемый журнал в свободном доступе, целью которого является вклад в литературу по теме сравнительного образования, путем предоставления критических анализов об общих и отличительных чертах в образовании в мировом масштабе (в форматах обязательного и дополнительного образования, а так же видов образования вне определенного образца), с акцентом на расширение и увеличение социальной справедливости в глобальном масштабе, имея в виду, что, например, ЮНЕСКО, к которой относится WCCES, объявила образование правом человека более полувека назад. Журнал приветствует публикации статей на шести языках ООН: арабском, китайском, английском, французском, русском и испанском.

Журнал ищет статьи, которые разнообразны по многим аспектам и взглядам, включая, но не ограничиваясь следующими темами: теории, методологии и методы; педагогические методики, инструменты и ресурсы; законопроекты; различные области

и сферы для сравнительных анализов (например, географической-, культурной-, лингвистической-, экономической-, исторической направленности, а так же вопросы народонаселения, такие как гендерные и расовые различия, этническая принадлежность, сексуальная ориентация), а также любые другие основания дифференциации, связанные с образовательными процессами, особенно со сравнительными перспективами. Особое внимание будет уделяться областям, исторически недопредставленным в сравнительном образовании и вопросам передачи знаний (например, с Юга на Север в глобальном понимании). *Всемирное Сравнительное Образование* является официальным журналом Всемирного Совета Обществ Сравнительного Образования (WCCES).

SOBRE LA REVISTA

Educación Comparada Global es una revista de acceso abierto, de revisión por pares cuyo objetivo es contribuir a la literatura de la educación comparada mediante la creación de espacios para presentar análisis críticos de las diferencias y de los aspectos comunes dentro de la educación en todo el mundo (formal, informal, y no formal), con un enfoque explícito en incrementar y extender la justicia social globalmente, teniendo en consideración por ejemplo que para UNESCO, de quién el WCCES is afiliado, ha declarado a la educación como un bien social hace más de medio siglo. La revista da la bienvenida a la presentación de artículos en los seis idiomas de la ONU: Árabe, Chino, Inglés, Francés, Ruso y Español.

La revista busca artículos que sean diversos en numerosos aspectos y perspectivas, incluyendo pero no limitándose: teorías, metodologías y métodos, practicas/herramientas/recursos pedagógicos, políticas, y el alcance/la naturaleza de la comparación (p.ej., geográfica, cultural, lingüística, económica, histórica y de población (identidad de género, raza, origen étnico, orientación sexual)) y cualquier otro campo de diferenciación en relación a los campos educativos, especialmente con perspectiva comparada. Se prestará especial atención en proveer espacio para aquellas áreas históricamente sub representadas en educación comparada y en la transferencia de conocimientos (p. Ej., Sur Global hacia Norte Global). Educación Comparada Global es la Revista Oficial del Consejo Mundial de Sociedades de Educación Comparada (WCCES).

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Editorial

N'Dri Assié-Lumumba
Cornell University

We are delighted to bring to you the second issue, Vol 2 No 1, of our peer-reviewed *Global Comparative Education: Journal of the WCCES*. The Journal publishes articles submitted in any of the six official languages of the United Nations: Arabic, Chinese, English, French, Russian, and Spanish. Following the first issue in 2017, it will henceforth appear twice annually, in March and September as initially planned.

The first issue was released during the 52nd Executive Committee meeting that was hosted by l'Université de Corse et l'Association Francophone d'Éducation Comparée –AFEC on the occasion of their joint colloquium on “Diversité culturelle et citoyenneté : Enjeux éducatifs à l'heure de la globalisation” held at the University of Corsica, Corte (Corsica, France) in October 2017. It is significant that the first part of the second issue is released in June 2018 on the occasion of three main WCCES events that are held in Johannesburg (South Africa) and hosted by the Ali Mazrui Center for Higher Education at the University of Johannesburg jointly with Indian Ocean Comparative Education Society (IOCES) and Southern African Comparative and History of Education Society (SACHES): the first ever retreat of the WCCES since its inception, the 53rd Executive Committee of WCCES, and the first between-congresses symposium entitled “Comparative Education for Global Citizenship, Peace and Harmony through Ubuntu” along with the 5th IOCES international conference on “Rethinking Epistemologies and Innovating Pedagogies to Foster Global Peace.”

We continue to make every effort to establish and sustain a stellar reputation with quality assurance, diverse perspectives and regular periodicity for the Journal. Vol. 2 No. 1 includes four regular articles (two in English and two in French), two articles on profiles of comparative educators, and two book reviews. The next issue (Vol. 2 No. 2) of the journal is already lined up to appear in September 2018.

It is very important to acknowledge, on behalf of WCCES, the contributions of so many colleagues along the way, whose continued enthusiasm and unfailing support have steered us to the production of this second volume about a year after the project was formulated and planned. I would like to thank a few among a larger group of supporters and well-wishers, who made invaluable contributions on so many critical fronts at different stages in the process of producing this issue: Eve Coxon, Kanishka Bedi, James Jacob, and Aïcha Maherzi. I thank Greg Misiaszek for his role in editorial management and coordination of the translation of the abstracts. I would like to express our gratitude to the members of the Advisory Board and the Editorial Committee. I wish to thank also many other colleagues who, even if they are not on the editorial committee, enthusiastically served as reviewers, often on very short notice. A few articles could not be revised satisfactorily in time to be included in this volume. However, we thank those reviewers as well for their recommendations in compliance with our rigorous standards and those authors who submitted such papers and hope they will be revised to

satisfaction for publication in future volumes. I would also like to express a special word of gratitude to the team that took on the translation and proofreading of the different versions of the papers and abstracts in the different languages.

I wish to express special thanks to James Jacob as the WCCES Historian who worked tirelessly to author, with colleagues, articles on profiles of Erwin Epstein and Vandra Masemann, two comparative education scholars who have played significant roles in member societies, namely Comparative and International Education Society (CIES), the Comparative and International Education Society of Canada (CIESC) and in WCCES. As Associate Editor, James has also shared his expertise and experience in copyediting. I would also like to thank Erwin Epstein and Vandra Masemann for their collaboration and generous sharing of information that, albeit only a glimpse into their prolific intellectual journeys, have enriched the profiles produced for this volume. We will work with the History Team, under the able leadership of James Jacob, to continue to bring more profiles to light for lessons, inspiration and just fun reading.

Many colleagues volunteered for other tasks that made a difference. Please, receive our deep expression of gratitude.

As indicated last year, the advisory board and the editorial committee will expand to increase inclusiveness so that we may have at any time a larger pool of scholars with vast disciplinary, local, national, regional and global expertise and ensure that with the bountiful language proficiency of members of the WCCES constituent societies we sustain quality contributions in different languages. Even if you are not formally on the editorial committee, you will be contacted, as we have already done, to assist with the review of the submissions and/or translations in the different languages.

I would like to reiterate that the vitality, sustained quality and regular periodicity of this journal will be a reflection of the continued support and commitment of each and all of us in the comparative education community.

Happy reading!

A *tok stori* about *tok stori*: Melanesian relationality in action as research, leadership and scholarship

Kabini Sanga

Victoria University of Wellington, New Zealand

Martyn Reynolds

Victoria University of Wellington, New Zealand

Irene Paulsen

Victoria University, Melbourne, Australia

Rebecca Spratt

University of Auckland, New Zealand

Joash Maneipuri

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The fit between methodology and context is an important matter in research. This article discusses the suitability of one research methodology, *tok stori*, in its indigenous location, Melanesia. *Tok stori* is a Melanesian Pacific relational mode of communication, widely practiced and understood, capable of application in a wide variety of Melanesian contexts. In this article, *tok stori* is first located in the relational web of the *wantok* system, and subsequently discussed through literature which draws on historical, cultural and regional perspectives. The relationship between *tok stori* and *talanoa*, its regional counterpart, is then explored. A *tok stori* session about *tok stori* provides the basis for a thematic analysis of *tok stori* as a form through various lenses: as a cultural norm; as process; as a space for relationality; and in intersections with the West. Finally, five findings are presented. These focus on the potential contribution of *tok stori* in a number of non-traditional fields, including deliberate leadership development and formal research. Advocating for Melanesian methodology as a fit with Melanesian research is an act of decolonisation. However, the relational core of *tok stori* also provides others with the opportunity to rethink the importance of valuing people in knowledge creation and learning. Thus, *tok stori* offers a counterpoint to decontextualized and dehumanised knowledge generation and advocates for the importance of relationality.

استخدام نمط توك ستوري للبحث حول توك ستوري: العلائقية الميلانيزية في العمل كموضوع بحث، قيادة وعلم التوفيق بين المنهجية والسياق أمر مهم في البحث. يناقش هذا المقال مدى ملائمة منهجية بحث واحدة، توك ستوري، في موقعها الأصلي، ميلانيزيا. توك ستوري هو نمط إتصال علائقي لميلانيزيا المحيط الهادي، يتم ممارسته على نطاق واسع وفهمه، ويمكن تطبيقه في مجموعة واسعة من السياقات الميلانيزية. في هذا المقال، توك ستوري يقع لأول مرة في الشبكة العلائقية لنظام وانتوك، وبعد ذلك تمت مناقشته من خلال الأدبيات التي تعتمد على وجهات النظر التاريخية والثقافية والإقليمية، ثم يتم استكشاف العلاقة بين توك ستوري وتالانوا، نظيره الإقليمي. جلسة توك ستوري حول توك ستوري تعطي أساسيات التحليل الموضوعي لهذا الأخير كشكل من خلال عدسات مختلفة: كميّار ثقافي؛ كمنهج، كمساحة للعلاقة والتقاطعات مع الغرب. وأخيراً، يتم تقديم خمس نتائج. وهذا يركز على الإسهام المحتمل لتوك ستوري في عدد من المجالات غير التقليدية، بما في ذلك تطوير القيادة والبحوث الرسمية. إن الدعم لمنهجية ميلانيزيا كنوع من البحث الميلانيزي هي عملية إنهاء الحقبة الاستعمارية. ومع ذلك، فإن النواة العلائقية لتوك ستوري توفر أيضاً الفرصة للآخرين لإعادة التفكير في أهمية تقييم الأشخاص في إنشاء المعرفة والتعلم. وهكذا، يقدم توك ستوري نقطة مقابلة لتوليد المعرفة غير المعنوية وغير المهيكلة، ويدافع عن أهمية العلاقة.

用tok stori的研究方法研究tok stori: 美拉尼西亚关系论在研究、领导力和学术中的应用
方法论与情境的相互匹配是研究中的重要问题。本文讨论了 tok stori 这种研究方法在其起源地--美拉尼西亚--的恰当性。Tok stori是一种广为人知并广泛使用的美拉尼西亚太平洋的交流方式，能在各种各样的美拉尼西亚情境中适用。本文将tok stori首先置于 wantok体系的关系网络中，并结合文献从历史、文化和地区的角度进行讨论。本文还探究了Tok stori和其地区性相似概念—talanoa--之间的关系。基于对 tok stori 的讨论，本文从多种角度分析了tok stori这一主题，并由此指出tok stori是一种文化范式；一种进程；一个关系论的空间；一个与西方的交点。最后，本文呈现了五个发现。这些发现强调了tok stori在一些非传统的领域中的潜在贡献，包括其对领导力发展和正式研究的作用。主张美拉尼西亚的方法论适用于对美拉尼西亚的研究是一种去殖民化的行为。然而，tok stori作为关系核心，同样给人们提供机会去重新思考人在创造和学习知识中的重要性。因此，tok stori提供了一种反对脱离情境和人文的知识生产方式，并强调关系论的重要作用。

Un tok stori à propos de tok stori: La relationnalité mélanésienne en action comme recherche, leadership et érudition

L'adéquation entre la méthodologie et le contexte est une question importante en matière de recherche. Cet article débat de la pertinence d'une méthodologie de recherche, tok stori, dans son lieu d'origine, la Mélanésie. Tok stori est un mode de communication relationnel mélanésien du Pacifique, largement pratiqué et compris, pouvant s'appliquer dans une grande variété de contextes mélanésiens. Dans cet article, tok stori est d'abord placé dans le réseau relationnel du système wantok, et ensuite débattu à travers la littérature qui s'inspire des perspectives historiques, culturelles et régionales. La relation entre tok stori et talanoa, son équivalent régional, est ensuite explorée. Une session de tok stori sur tok stori fournit la base d'une analyse thématique du tok stori en tant que forme à travers différentes représentations: en tant que norme culturelle; en tant que processus; comme un espace pour le raisonnement; et aux intersections avec l'Occident. Enfin, cinq résultats sont présentés. Ceux-ci se concentrent sur la contribution potentielle de tok stori dans un certain nombre de domaines non traditionnels, y compris le développement affiché du leadership et la recherche formelle. Plaider en faveur de la méthodologie mélanésienne en accord avec la recherche mélanésienne est un acte de décolonisation. Cependant, le noyau relationnel de tok stori donne aussi à d'autres personnes l'occasion de repenser l'importance de valoriser les gens dans la création et l'apprentissage des connaissances. Ainsi, tok stori offre un contrepoint à la génération de connaissances décontextualisées et déshumanisées et plaide pour l'importance du raisonnement.

Tok stori o tok stori: Меланезийская реляционность в действии как исследование, лидерство и знание

Соответствие между методологией и контекстом является важным вопросом в исследованиях. В этой статье рассматривается пригодность одной методологии исследования, *tok stori*, в исконном местоположении, Меланезия. *Tok stori* – это Меланезийский Тихоокеанский реляционный способ общения, широко практикуемый и понимаемый, который может применяться в самых разных меланезийских контекстах. В этой статье *tok stori* сначала рассматривается в реляционной сети системы *wantok*, а затем обсуждается в литературе, которая опирается на исторические, культурные и региональные аспекты. Затем исследуется взаимосвязь между *tok stori* и *talanoa*, его региональным аналогом. Сессия *tok stori* о *tok stori* обеспечивает основу для тематического анализа *tok stori* как формы через различные линзы: как культурную норму; как процесс; как возможность для реляционности; и в пересечениях с Западом. В заключение, представлены пять выводов. Они сосредоточены на потенциальном вкладе *tok stori* в ряд нетрадиционных областей, включая целенаправленное развитие лидерства и формальные исследования. Пропаганда меланезийской методологии как соответствия меланезийским исследованиям является актом деколонизации. Тем не менее, реляционное ядро *tok stori* также предоставляет другим возможность переосмыслить важность ценности людей в создании и обучении знаний. Таким образом, *tok stori* представляет контрапункт для деконтекстуализирования и дегуманизирования поколением знаний и выступает за важность реляционности.

Una tok stori sobre tok stori: La relacionalidad melanesia en acción como investigación, liderazgo y erudición

El ajuste entre la metodología y el contexto es un crucial en la investigación. Este artículo discute la idoneidad de *tok stori* como metodología de investigación, en su ubicación indígena, Melanesia. El *tok stori* es un modo de comunicación relacional del pacífico melanesio, ampliamente practicado y entendido, capaz de aplicarse en una amplia variedad de contextos melanesios. En este artículo, *tok stori* es ubicado por primera vez en la red relacional del sistema *wantok*, y consecutivamente se discute a través de la literatura que se basa en las perspectivas históricas, culturales y regionales. Luego se explora la relación entre el *tok stori* y el *talanoa*, en su contraparte regional. Una sesión de *tok stori* sobre *tok stori* fundamenta un análisis temático sobre *tok stori* a través de varios lentes: como una norma cultural; como un proceso; como un espacio para la relacionalidad; y una intersección con el oeste. Finalmente, se presentan cinco hallazgos. El enfoque está puesto en la potencial contribución del *tok stori* en una serie de campos no tradicionales, incluyendo el desarrollo deliberado de liderazgo y la investigación formal. La defensa de la metodología melanesia como parte de la investigación melanesia es un acto de descolonización. Sin embargo, el núcleo relacional del *tok stori* también brinda la oportunidad de repensar el alcance de valorar a las personas en el conocimiento de la creación y el aprendizaje. Por lo tanto, el *tok stori* ofrece un contrapunto a la generación de conocimiento descontextualizada y deshumanizada y aboga por la importancia de la relacionalidad.

Introduction

Lynda Tuhiwai Smith (1999) reminds us that for Indigenous peoples, “our stories local and global, the present, our communities, cultures, languages and social practices—all may be spaces of marginalisation, but they have also become spaces of resistance and hope” (p. 4). This article pays attention to one social practice, *tok stori*, a communication mode of Melanesian origin, and seeks to tell part of its story. *Tok stori* offers opportunities for researchers and others to follow a relational path in their investigations, one which recognises the connectedness of humanity. Such a path is likely to yield learning which serves the interests of communities precisely because the methodology is ontological: *tok stori* is a way of being in the world and of understanding the world. We begin the story with a brief discussion of the *wantok* system, paying attention to the way webs of connectivity develop Melanesian-style. We then present some of what has already been told of *tok stori* with a focus on some areas

where *tok stori* as research has been found useful. Then, we examine a *tok stori* about *tok stori*, using data from a *tok stori* session which took place at the 2017 Oceania Comparative and International Education Society (OCIES) Conference in Nouméa, New Caledonia. Finally, we outline the contribution which a greater recognition of *tok stori* offers to the wider world.

Connection, the *Wantok* System, and *Tok Stori*

Melanesia is a term often used for a sub-area of Oceania, extending from the island of New Guinea in the south western Pacific Ocean eastward to Fiji. This region includes the five nation states of Papua New Guinea (PNG), the Solomon Islands, Vanuatu, New Caledonia, and Fiji. In this article, much of the material is drawn from the Solomon Islands, PNG and Vanuatu. This reflects the limited availability of material on *tok stori*, the linguistic limitations of the authors in regards to French, a tendency of some writers on Fiji to refer to *talanoa* when discussing relationally-focussed research (Koya, 2013; Thornborrow & Morris, 2004; Vaioleti, 2006, 2013), and a pragmatic decision to focus on connections between peoples under the Melanesian umbrella despite the colonial origins of the term (Kaiku, 2011).

One consequence of colonialism in Melanesia has been linguistic. Tok Pisin (PNG), Tok Pijin (Solomon Islands), and Bislama (Vanuatu) are related “creole” communication forms which were developed in the nineteenth century (Romaine, 1989, 1992). These languages provided the basis upon which people across the region could communicate and relate with Europeans and, perhaps more importantly, with each other. Subsequently, focused on cultural similarities and the mutual intelligibility of *Tok Pisin*¹ as a linguistic connection, a pan-Melanesian identification termed by some as the Melanesian Way developed (Lawrence, 1975; Narokobi, 1983). This is sometimes connected to the political entity of the Melanesian Spearhead Group (MacQueen, 1989), although the links between political rhetoric and on the ground realities have been contested (Kabutaulaka, 1994). Whatever the case, language, identity, and connection go hand-in-hand in Melanesian societies and, in addition to communication across the region, the various forms of *Tok Pisin* offer communication in a common tongue to individuals from different languages and cultural groups within nation states. In both local and regional situations, linguistic comprehension coexists with the idea of being a *wantok*.

The word *wantok* was developed to express connection in a context where labourers from various Melanesian language groups² worked together on coconut and other plantations (Nanau, 2011). In the *wantok* system, according to Okole (2005),

The underlying premise is that an actor (person or group) within a *wantok* relationship can assume that it has something in common with other actors. The *wantok* system provides the basis for social interaction among actors that otherwise would have little in common. (p. 47)

Although the imperative for connective social networks of obligation preceded contacts with Europeans (Tanda, 2011), and despite the fact that the concept can mean “slightly different things to different people depending on the context and circumstances under which it is used” (Nanau, 2011, p. 31), the *wantok* system is a flexible embodiment of a firm tenet of Melanesian life. What underpinned family and village-based connections has been “purposefully transformed” (Repič, 2011, p. 78) into a layered approach to relationality where the basis and actual language of connection can vary between layers: being a *wantok* is a method for creating society in urban locations (Schram, 2015) as well as a reflection of the reality of village

¹ For the sake of convenience, the PNG form, Tok Pisin will subsequently be used unless a specific reference requires otherwise.

² The Melanesian region of the Pacific is linguistically diverse with more than 1,000 indigenous languages and a number of English-based pidgins (Tok Pisin in Papua New Guinea, Pijin in Solomon Islands and Bislama in Vanuatu) and creoles; spoken by about nine million people.

existence. Regionally, the concept of being a *wantok* is also an element underpinning notions of Melanesianism (Lawrence, 1975). As a relational network, the *wantok* system can sit uncomfortably with supposedly non-relational Western-based social structures (Mana, 1999; Tanda, 2011). However, as McLeod (2008) says, the *wantok* system points “to the ongoing importance of kin and the attached notion of reciprocity” (p. 8) in Melanesia, where relationality is central and language as *tok* is a key element in indicating the kinds of relatedness experienced and obligation due. *Tok stori* is an element of negotiating relatedness in an ongoing way. Being a *wantok* through *tok stori* implies being involved in the creation of a negotiated understanding of the world.

***Tok Stori* in the Literature**

Just as the meaning of *wantok* is contextual, so is *tok stori*. When claiming *tok stori* as a methodology as well as an ontology, a tension must be acknowledged between specific and longstanding cultural contexts and more contingent experiences. These poles are represented in the literature by village- and regional-level examples.

The literature gives examples of storytelling traditions at the village level in Melanesia and suggests that not all storytelling can easily be termed *tok stori*. For instance, Van Heekeren (2014) provides an interesting investigation of the contextual complexities of the word *stori* as used by the Vula’a of PNG. He outlines the way the *tok pisin* word *stori* has subsumed *tok ples* (local words) for several narrative forms such as *rikwana*, a term which is close to the English word legend. Van Heekeren points to the European misunderstanding that *stori* means story, whereas, depending on context and the tribe of speaker, it can refer to a range of things. Thus, beyond denoting *rikwana*, the word *stori* is used “to refer to a range of conversational activities; from telling jokes and anecdotes and discussing local gossip to relating events of historical importance” (p. 174). *Stori* in this context is as much about being social and talking as it is about giving information through content or meaning. The meaning of *stori* is active, and “conversation is given great social value” (Van Heekeren, 2014, p. 174). Relationality is at the heart of *stori*, and central to *tok stori* as an activity.

At the regional end of the spectrum, Kabutaulaka (2015) sees *tok stori* as both rooted in Melanesia and as a central element in Melanesianism. Acknowledging relationality as the core of *wantokism*, Kabutaulaka sees *tok stori* as the discursive embodiment of Melanesia, a fluid relational process where linguistic bonds connect. Evans, Guy, Honan, Paraide, and Muspratt (2010) describe *tok stori* in PNG as “an oral tradition where reflections on issues or problems are undertaken dialogically” (p. 83); Vella and Maebuta (2018) in a Solomon Islands context say it is “a cultural and accepted method of sharing information” (p. 66); and Brigg, Chadwick, Griggers, Murdock, and Vienings (2015) call *tok stori* a “traditional orally transmitted Melanesian processes of discussion” (p. 10). Thus, common ground can be seen across the region.

Although some writers have used the Polynesian *talanoa* and *tok stori* synonymously (Houma, 2011; Nanau, 2014; Sanga, 2016), *tok stori*, when understood as a processual relational negotiation, is different in scope from *talanoa*. For example, Tongan discussions of contextually-important elements of *talanoa* (Fa’avae, Jones, & Manu’atu, 2016) do not apply, whereas an acknowledgement of the significance of village-based understandings such as those discussed by Van Heekeren (2014) may be more relevant. What is at stake in distinguishing *talanoa* and *tok stori* is not protocol which is, in any case, always contextual, but identification and Melanesian ownership. For example, in the context of post-tension negotiations in the Solomon Islands, the grass roots appeal of *tok stori* was its recognition by villagers as “their

custom way” (Talanoa & Development Project, 2005, paragraph 8). *Tok stori*, then, is a Melanesian expression of commitment to togetherness manifest through engaging in *stori*, a shared narrative which dialogically constructs reality. This is the core of its ontological nature.

Tok stori is reported in the literature as an effective approach to research as knowledge generation in several fields. Of special interest are the ways in which *tok stori* relates to thinking, actions and activities which have Western origin. Although before colonisation Indigenous groups “had to work out ways of knowing,... to predict, to learn and reflect” (Smith, 1999, p. 13), one role formal research following the Western tradition can perform in postcolonial life is to mediate “between the interests and ways of knowing of the West and the interests and ways of resisting the Other” (p. 2). *Tok stori* as practiced amongst *wantoks* in villages and towns in Melanesia is an everyday occurrence. The question is, how can *tok stori* contribute in other contexts? In order for the potential of *tok stori* as resistance and Indigenous voice to be realised in intercultural contexts, we might heed the advice of Thaman (2008) to “look towards our own cultural roots for inspiration in order to reclaim our conversation with one another about our education and about living together as a human family” (p. 463). Because *tok stori* has deep roots, its pedigree for sponsoring positive change is well-established. In the modern world, this potential continues. To illustrate this, examples from the literature of *tok stori* as knowledge generation in conflict mediation, leadership development, and educational research will now be discussed.

Brigg and colleagues (2015) discuss *tok stori* as mediation, specifically in post-tension Solomon Islands. In this extreme situation, *tok stori* was adapted with the intention of enhancing its potential for bringing peace. After the cessation of violence, the National Peace Council (NPC) and local chiefs organised *kastom* (customarily based) protocols in the form of “bridging” (Brigg, et al., 2015, p. 10) ceremonies as a prelude to *tok stori*. These events, sometimes conducted in a shuttle fashion between groups, were intended to bring participants to a relational state where *tok stori* would be possible. *Tok stori* was then used in conjunction with a Western stage-based conciliation model, a blend described as “externally assisted dialogue” (Spence & Wienders, 2006, p. 11). Although the vitality of *tok stori* is indicated by its adaptability, the need for this assistance is disputed. Briggs and colleagues (2015) recall that a “former senior NPC official noted... a system for dealing with the full range of human conflicts and grievances had historically been in place throughout the Solomon Islands” (p. 11). Whatever one’s opinion, *tok stori* embedded in the peace-making initiative was central to re-establishing order through reconciliation.

In the context of leadership development, Sanga (2017) gives an account of “storying as pedagogy” (p. 101), a process of people development which is the antithesis of the “forced separations” (p. 102) of abstracted theory and lived experience found in some other approaches to leadership development. In his account, key aspects of *tok stori* as pedagogy include: friendship as a basis for interaction, which allows experiences to be shared in unthreatening situations where the challenging of assumptions is supported by relational closeness; leadership as a relational activity which is primarily narratively embedded rather than strategically understood; inclusiveness, where *tok stori* is unifying through narrative and the stratification of position and abstraction are downplayed; and validation for those whose world-view tradition is generally mediated through storying. In Sanga’s view, storying itself invites listeners to open their worlds to each other and become part of each other’s stories. Its active nature mitigates against stagnation and dependence, and works in favour of productive and deep conversation. Storying is a powerful pedagogy since it focusses collaboration, cooperative activity, action through talk, innovation through contextual reshaping and construction of new, fluid realities. *Tok stori* is the Melanesian form of this.

Other writers have described *tok stori* in formal research contexts. Davidson (2012) describes *tok stori* in her research as a method where the Western forms of interview and focus group “morphed in one-on-one or group ‘stori’ sessions” (p. 63). She suggests that *tok stori* fluidly frames power in research: participants can anticipate the shape of conversations through their own knowledge. Despite being an outsider with limited fluency in *Tok Pisin*, Davidson was aware of ungrasped subtleties in *tok stori* beyond the narrative inquiry principles driving her work, and of the importance of relationality to *tok stori*. *Tok stori*, it seems, transcended the theories she brought to the field. However, the observation of similarity between *tok stori* and focus groups has led these forms to being seen as one (Roughan, et al., 2011). Where this happens, the surface appearance of group discussion can mask the ontological differences between telling one’s story to others in the hope that it will be heard and participating in the creation of a relational world through *tok stori*. This danger points to the need to focus on the *stori* process and its ongoing relationship to life rather than a narrative and its relationship to the past. In the former, *tok stori* invokes aspects of being a *wantok*. The latter involves listeners.

A Tok Stori About Tok Stori

At the 2017 OCIES conference in Nouméa, New Caledonia, a *tok stori* about *tok stori* took place in the English language. The intentions included: investigating what was understood about *tok stori* by participants; furthering the development of deliberate thought about *tok stori*; focussing on Melanesian relationality within a Western-defined conference space; and signalling the potential of *tok stori* to contribute to research of benefit to Melanesian people and others interested in advancing a relational understanding of humanity. The participants numbered 17, and included: people from Papua New Guinea, the Solomon Islands and Fiji; non-Melanesian people from the United States, New Zealand, and Australia with experience of *tok stori*; and others with no experience but who wanted to take part in, and further their understanding of the potential of *tok stori*. All authors were participants in this activity.

The session touched on *tok stori* as an everyday part of Melanesian life, in research, leadership development, as pedagogy, and as an activity within Western-framed contexts such as international aid. The *tok stori* session lasted an hour and a half, and was recorded and transcribed with participants’ permission. The first five or so speakers had been asked to consider in advance what they might say, and the first speaker set the scene for the group. What follows is a thematic analysis of the transcript of the *tok stori*, developed to expose some of the features of *tok stori* as understood by participants, as well as to focus questions about its parameters and relevance. Following the discussion of themes, we present a more general discussion of *tok stori* as ontology. Participants are identified by number throughout (P1, P2, and so on).

Thematic Discussion

Aspects of Tok stori and contexts for its operation

This section discusses *tok stori* as a cultural form, process, expression of relationality, and some of the ways it exists in interfaces with ideas and practices from the West.

***Tok stori* as a cultural form**

A helpful approach to culture in the context of *tok stori* is to see culture as “a system of logic with its own underpinning assumptions and internal coherence” (Mila-Schaaf & Hudson, 2009,

p. 115). This draws attention to the connections between what people do, make and believe, rather than atomising life into actions, objects and thoughts. In this view, culture is what joins the various things we do and think, giving pattern to a shifting and negotiated network of observable occurrences and abstract ideas. From this position, flexibility in the way something is manifested does not undermine the idea of culture. Instead it speaks of the coherent logical underpinning through which flexibility in action is validated, giving evidence of the tenets through which sense is made. It is this logic which connects being a *wantok* and *tok stori*.

Some Melanesian participants in the session recognised *tok stori* as a cultural form from their village experiences with *wantoks*. One participant (referred to as Participant 1-P1) described how a layered series of traditional contexts can fall under the general term *tok stori*:

The very basic concept of *tok stori* in my language is *faghaja*. That is the term we use. *Faghaja* is a space; a space wherein two familiar people are interacting; a space which is easy. The next layer is *toutonu*. *Toutonu* is much more formal than *faghaja* and involves many more participants than *faghaja*. The next layer is *haidu*. *Haidu* involves talking about actions which we are to take. This involves talking about what we are to do; about the outcomes. (P1)

Here, the general Tok Pisin term *tok stori* applies most comfortably in a wide and general context, *faghaja*. *Tok stori* as *faghaja* is spatially focussed: space can be understood as both the form and site of *tok stori* as *faghaja*, an “easy” space, based on relational and physical closeness. Variations arise contextually on numerical and functional grounds. This unpacking is similar to Van Heekeren’s (2014) discussion of the understandings of the Vula’a outlined above. In both cases, although specific linguistic terms are offered for talk according to context, the generic term *tok stori* operates to reinforce the relational and interactive nature of many discursive encounters.

Melanesian participants, while not contributing taxonomic accounts of spoken encounters at village level, also attested to their familiarity with *tok stori*. For instance, one said, “*tok stori* is something I am familiar with. Culturally, I use *tok stori* with family and relatives, every day, in the village” (P2). However, familiarity can depend on context: “I am a novice in *tok stori* as a research approach, I am actually a practitioner of *tok stori* in a cultural sense.” (P1) The use of the word culture by participants echoes the findings of the Talanoa and Development Project (2005) cited previously regarding the importance of familiarity and ownership to the significance of *tok stori*.

The levels of people’s understanding in *tok stori* can vary. One non-Melanesian participant with much experience in the region commented, “To really *tok stori*, you’ve got to be fluent in the language. Not just the language but the names of people, places and things. If you do not know, you will not fully *tok stori*.” (P11) This draws attention to the way meaning is encoded in language at more than one depth, and to the role of linguistic knowledge in appreciating information beyond immediate denotation. Comprehension is also layered by the degree of contextual cultural awareness. A Melanesian participant pointed to the way metaphoric language and other contextual aspects present in *tok stori* can either facilitate or limit understanding:

In *tok stori*, people use metaphors all the time. Recently, I was in [an area] and was having a conversation with a teacher who told me that in her school, teachers are not performing because most of them sit down in front of a big mountain and breathe on it. If you do not know that, you won’t understand. In another situation, another teacher was telling me to receive what she was telling

me as “a snake rotting in your mouth.” The matter is confidential, you cannot share it. So, in *tok stori*, you might miss so much. (P3)

In addition, paralinguistic expression is not universal. It can contribute to understanding, but is contextual and demanding of participants: “In *tok stori*, it is easy to miss many things. If you look at gestures, people’s faces, etc., you can miss many things. Someone might say, “I am alright,” but their faces will tell you that they are not.” (P3)

Thus, the distinction between *tok stori* where all members are deeply embedded in a cultural or situational niche and *tok stori* between people whose prior-connection is more functional or short-lived points to the significance of context in reading what is said. This variation attests to *tok stori* as a mutable form of communication organised around a relational core. In the words of one participant, “the process of *tok stori* involves interactions—it is about relationships.” (P1) The processual development of relationships as a key aspect of *tok stori* is part of its logic.

Tok stori as process

Tok stori is an example of what Smith (1999) means when she writes of the success of Indigenous communities “to work out ways of knowing ... to predict, to learn and reflect” (p. 13). In the Nouméa session, *tok stori* was characterised as a way of coming to know, an important process because, “particularly in Indigenous knowledge systems, certain knowledge is hidden in the practices of communities.” (P4) This points to the *tok stori* process as a revelatory practice. In the session, the facilitator invited participants to ‘do’ *tok stori* – to engage in a ‘practice’ intended to ‘draw out insights’ - reveal their understandings to themselves and others through a dialogical process. (P4)

The *tok stori* process is active. Listeners and speakers alike are expected to have an ongoing commitment to sense making. One participant in the Nouméa session illustrated this in a reflection about intergenerational *tok stori*:

In my own cultural background, when you ask a question of an elder, instead of giving you a direct answer, they’ll tell you a story. The young person will say, “I don’t want to hear a story. Tell me what to do.” The whole point being, the elder uses a metaphor or a story or a parable and the younger person is to figure it out. That is the power of storying. (P5)

In this example, the passivity of being told is contrasted by the activity of responding to *stori*: linear narrative is contrasted with a more circular structure. Because people’s experiences are different, *tok stori* is a space where each person can learn from others by re-shaping the understandings they hear to make sense of their own context. The meaning is in the process—in the *stori* told, the responses made, and the relationship between them. In this instance, the elder is the expert in what they tell, but the young person must become an expert in what it means to them at this point in their life.

Spatial arrangements can reflect the ongoing processual nature of *tok stori*. In the *tok stori* session in Nouméa there was “no one ... standing up front to talk. Instead we are sitting in a circle. Our sitting arrangement demystifies the concept of expert knowledge holder by making us sit together in a circle.” (P4) Relationships and power dynamics always condition interaction but “*tok stori* is a creation of space for people to tell their own *stori*.” (P4) *Tok stori* is an adaptable process which “depends on who it is that is present. *Tok stori* is about the people who are there” (P4) and about their relationships.

Tok stori as relationality

The importance of relationality in Melanesian life is clear through the cultural reference of being a *wantok*. As has been discussed, the “*wantok* system provides the basis for social interaction among actors that otherwise would have little in common” (Okole, 2005, p. 47). *Tok stori* is practiced amongst *wantoks*, and although taking part does not necessarily make one a *wantok*, the process provides a space whereby greater levels of connection can be identified and/or developed. Close relationality among strangers may take time to develop, and for *tok stori* to deal with private, difficult, or contentious issues, trust can be important. Culturally, “Solomon Islanders are suspicious of each other. They may sit around together but they will not readily give you the information you seek. You need to establish relationships first.” (P6) In new situations, especially in contexts which are not directly informed by shared understandings, the depth of *tok stori* “depends very much on how the environment and climate for *tok stori* is created and built. Because of this, it is very important to build a trusting relationship.” (P2) To pursue a specific subject in an unfamiliar context, time and the willingness to adapt may be required, for “*tok stori* is about knowing people and not about keeping to procedures and certain processes.... When you understand people, then you begin to understand the procedures and processes they use.” (P2) When close and trusting relationships exist or are assumed, *tok stori* can be “a co-created, self-created, sustainable, and owned development ... a people-enhancing development.” (P4)

Tok stori interfacing with the West

As has been previously discussed, *tok stori* is an umbrella term which has come to cover many distinct forms of talk in Melanesian village contexts. *Tok stori* is also an umbrella term denoting a growing field of activities in contexts where the Melanesian world meets ideas and structures from the West. Participants’ understandings of *tok stori* in the contexts of research and leadership development provide examples of situations where Melanesian and Western thinking meet.

Research

Some participants spoke of their experiences of *tok stori* in research. One highlighted aspect was relational closeness. One participant explained: “*Tok stori* lends itself so well to research because it involves the actual coming down to the level of people in their contexts. This allows a face to face interaction which ensures an in depth drawing out of information. *Tok stori* is a space which is open.” (P1) The meeting of research participants as people in *tok stori* can lead to deep responses. When trust is established, no lack of knowledge or imagination on the part of the researcher constrains what people can contribute because they are free to tell their own *stori*.

The potential of *tok stori* in research in Melanesian contexts was compared to other research activities such as questionnaires and formal interviews. This can be in terms of participation: “I told myself, “I know these people but why are they not answering my questionnaire?” This led me to use *tok stori* instead.” (P6)

Relationships also affect the veracity of data: “Of course, participants wanted to please us by saying good things in answer to our questionnaire. They listed 5,5,5,5. But when we discussed ... we learnt that there were many layers of experiences and meanings. So that was a valuable exercise.” (P7)

The relationality of *tok stori* can lead to distinctive kinds of data: “We have seen that the *tok stori* data is very different, rich and complex. It seems clear to us that the kind of data which you cannot capture from a questionnaire will come out in *tok stori*.” (P2) Data is valuable to the extent it reflects the lives of those whom research aims to serve. If the Melanesian world is complex, relational and reciprocally constructed, *tok stori* has its place because of its consistency with that world. The above comments reveal the limitations in Melanesian contexts of research methods which construct wide relational distances between participants and the researcher. They also speak to the value of *tok stori* as a way of embracing closeness as an element in successful research.

Leadership Development

In the context of leadership development, one participant storied about the potential of *tok stori* to reveal the complex world in which leaders operate which demands a responsive rather than a pre-constructed programme. Comparing more linear approaches to *tok stori* in this context he recalled:

Instead of starting with an abstract idea of what we want educational leadership to look like, we asked leaders about their practices of leadership. We began by asking leaders about themselves, about the work they do as leaders in their settings. So, for example, we started to *tok stori* with leaders about what they did as leaders, the day before. And as they were talking about this, we asked about why they did what they did. (P2)

In *tok stori*, leaders start as experts in their own leadership and can explore their self-understandings on an equal footing with programme facilitators. Learning can be reciprocal under these conditions:

Leadership as seen in *tok stori* was different from one place to another. This was an important realization for me; that reality is not lineal. Reality is not simple. Reality is complex. Having understood this, we began to look for different ways of supporting leaders in their own contexts, to be of help to them as mentors. (P2)

In this way, *tok stori* is reciprocal learning. The outcome in this case was that the programme “learned.”

Negotiating between tok stori and the West

In intercultural situations, successful outcomes involve negotiation. Issues of time, recognisability and validity surfaced in the *tok stori* session as contested aspects of the relationship between *tok stori* and Western thinking and practices.

Time

According to participants, different understandings of time provoke the need to negotiate between *tok stori* and the West. This is because “there is no start and finish or end of a *tok stori*. *Tok stori* continues. It does not respect project deadlines.” (P8) However,

In an international project, we have deadlines. *Tok stori* often easily goes on for hours and days, especially when there are interesting things to talk about.... So you have to have a way of suspending or ending *tok stori*.... So, even when the

tok stori is sweet, you might need to say to people, “Ating hem naf nao ia.” (I think that is enough for now.) (P2)

Non-Melanesia participants storied about *tok stori* as reflexive learning. With more lineal expectations, it can be a surprise when “the *stori* would go round and round and I would be going, ok, but you already said that three times.” (P9) The ubiquitous Western value of efficiency is denied by repetition if *tok stori* is not understood as an ongoing process. Another non-Melanesian appreciated this tension:

Tok stori as a process needs to be kept front and centre. It is very easy to confine it into a box. (P8)

Short time frames, perhaps set up to match budget cycles, encourage “boxing”—the shaping of actions to facilitate programme demands rather than to respond to people in their context.

Validity

As has been discussed, *tok stori* is indigenous to Melanesia and endemic to Melanesian life. Yet, *tok stori* can seem invalid in contexts which interface with Western thinking, a result of the belittling consequences of colonialism discussed by Hau'ofa (1994). The invalidity of *tok stori* can be suggested by its absence. One participant storied about the start of her research journey.

In PNG, I went in as a researcher. Armed with my questionnaire and survey guide, I went to work. However, some *wantoks* met me and asked us to go to a party instead ... the stories were so “in the present,” so full and rich. When I returned to university, I started to change my approach to research. I began looking for decolonizing literature. (P10)

In this account, experiential learning in a Melanesian context revealed what institutional programmes had not: “full and rich” data can develop through the researcher being with people in *tok stori* because *tok stori* makes sense in Melanesian contexts such as PNG.

The validity of *tok stori* can also be challenged by a failure to name it. Names give us ways of approaching, adapting and developing the things we do. Silencing a name impedes agency. One participant’s *stori* attests to this:

I have just recently been introduced to *tok stori*. However, in my own doctoral research, I was using *tok stori* in my data gathering and recording of data but I did not have a name for these, as *tok stori*. But now, I understand that what I was doing was *tok stori*.... I am grateful for the older Pacific academics that have helped us to understand such tools as *tok stori*. (P1)

In this case, naming *tok stori* has made it malleable as a tool and has linked the research genealogically to the well of Melanesian knowledge.

Recognisability

Related to time and validity is negotiation between *tok stori* and thinking from the West around recognisability. This concerns the willingness of programmes such as those developed by international aid donors to recognise the contribution *tok stori* can make in achieving their objectives. The *stori* of one non-Melanesian participant serves to illustrate this:

I think that we’re living in a world where processes and stories are not valued. Rather only the product at the end; the product that can be measured is valued....

The question therefore is, how do we make that process, the product that can then be more valued?... Immediately people [in the donor community] are wanting to reduce *tok stori* into a “thing.” (P8)

There is a tension between seeing people-centred activities in Melanesia as a technical matter requiring techniques and understanding *tok stori* as a processual way of being. If *tok stori* is recognised as a valid enterprise and given time, a recognition of its capabilities to create a context for learning may follow:

In terms of change, a project needs to be guided by a particular theory of change. We need to know what particular factors are likely to contribute to change. Because *tok stori* is contextual, the entire cultural setting will have to be taken into account in determining the appropriate theory of change. (P2)

Discussion

In the following section, we summarize the main findings of this study and explore the further implications for *tok stori* in international development and research. First, we argue that *tok stori* is ontological. To Melanesians, *tok stori* reality exists subjectively in the shared social interactions and social space between *tok stori* participants or actors. Such a reality is contextually defined and exists within relational settings. It is expressed authentically, using shared language and other cultural expressions, and owned as cultural by *tok stori* actors. Given that *tok stori* is highly relevant in Melanesia, its use in international development and research projects is appropriate and to be encouraged. Advocacy of *tok stori* use is made despite the limited research knowledge: much is yet to be known about *tok stori*. This includes any understanding of manipulative *tok stori* which may seek to use the form while denying its ontology.

Second, the study describes *tok stori* as a process which is active, revelatory and inviting of others. Unlike other forms of narrative which are linear, *tok stori* is circular in structure. Meanings are embedded in the *tok stori* process and are therefore discerned by interpretation. By implication, because Melanesian *tok stori* as process is active, it uses Melanesian rules of interpretation. As a result of its circular structure and processual nature, *tok stori* offers both new opportunities as well as challenges for international development and research projects. *Tok stori* also demands that sensitivities of Melanesian human experiences of space, time, value, order and change as yet unrecognised by scholarship are developed and used.

Third, in support of its focus on people, the study sees *tok stori* as relational. Pedagogically, *tok stori* enables relationships to be built between *tok stori* actors. In sharing *tok stori*, actors are invited into each other's worlds; thereby enabling people to explore, develop and deepen their relationships with each other. Within international development and research projects, a deliberately relational intervention is likely to be more liberating and socially just for all *tok stori* actors. Relational interventions promote understanding through the involvement and development of the whole person.

Fourth, the study identifies two *tok stori* interfaces. In relation to research, *tok stori* lends itself to relational closeness with Melanesian people. In doing so, *tok stori* enables the sharing and celebrating of rich and complex social data in certain kinds of research. In relation to leadership development, *tok stori* reveals leadership as experience-based rather than theoretically driven, thereby demanding that leadership development interventions be responsive and adaptive to lived leadership realities. Given these interfaces, perhaps *tok stori* offers an opportunity for renewed re-creation and co-creation of international development and research relationships

which are enabling, respectful and reciprocal for Melanesian people (as *tok stori* actors and communities).

The fifth and final finding of this study relates to the issue of mediating *tok stori* and the West. In international development projects, it is noted that different understandings of time by Melanesians and the West need to be negotiated. Because *tok stori* is ongoing, it is easily boxed in development projects by abrupt, linear constructions of efficiency. In research, the study points out that there are two areas for mediation. The first relates to the observation that the validity of Melanesian *tok stori* can be enhanced by its deliberate and defensible inclusion in mainstream research. The second relates to the proposition that that when researchers name Melanesian *tok stori* as a valid research philosophy, methodology, approach and method, doing so supports the further use and development of Melanesian *tok stori* in mainstream research. Perhaps, beyond mediating *tok stori* with Western paradigms of international development and research, *tok stori* as ontology offers a more ethical space wherein communion, communication and enlarged understanding of people is centred.

Conclusion

In this article, we have argued for the recognition of *tok stori* as ontology, underpinning its potential as a methodology in several fields such as conflict resolution, leadership development and research. Limits to its recognition are reinforced by thin literature, and this article is a small step towards developing a greater scholarship of *tok stori*. A comprehensive approach has not been possible in this forum, nor was it in the *tok stori* session about *tok stori* in Nouméa which provided the original data here. Indeed, participants' questions remain unanswered both there and here. Thus, areas for further exploration include: the relationship between *tok stori* and various forms of power and status: gender, age-related, culturally defined hierarchies, traditional restrictions on who can talk to whom, and so on.

There is evidence on the ways Indigenous orality and rhetoric can be negotiated in post-colonial spaces, such as in formal education in Australian Aboriginal communities (Ma Rhea, 2012). Therefore, the place of *tok stori* could be developed in the wider literature of Indigenous orality and rhetoric in similar contexts. Other contexts for *tok stori* also deserve future thought. These might include: the relationships between *tok stori* and restorative practice in education, *talanoa*, and other forms of dialogic human engagement. Despite these gaps, we offer *tok stori* as a way of negotiating a shared understanding of the world which resonates with an imagined Melanesian mind because it focusses on: reciprocal learning, the development of understanding, the validation of experience, and the enhancement of relationality—the drawing together of people as putative *wantoks*. For these reasons we consider this and future efforts of scholarship worthwhile.

Acknowledgement

Appreciation is offered to the following who participated in the *tok stori* at the Noumea OCIES: Emilie Sila'ila'i, Robert Early, Sapna Sharma, Martyn Reynolds, Nina Tu'i, Yolande Cavaloc, Julie McLaughlin, Rebecca Spratt, Hellen Marau, Roselyn Maneipuri, Joash Maneipuri, Billy Fito'o, Minerva Blancaneaux, Randy Thaman, Kabini Sanga, Rae Siilata, and Irene Paulsen.

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Education, colonisation et quête d'indépendance de la Nouvelle-Calédonie

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Dernier vestige de l'empire français jadis étendu et puissant, la Nouvelle-Calédonie est un petit groupe d'îles du Pacifique Sud-ouest dont la politique a été dominée depuis les années 1970 par les revendications d'indépendance du peuple kanak. Appuyés sur place par une population de colons farouchement anti-indépendantistes, les gouvernements français successifs ont refusé de répondre à ce désir de souveraineté du peuple kanak. S'en suivit un conflit important et des violences des deux parties qui cessèrent fin 1988 avec un accord de paix axés sur « le développement et le rééquilibrage » de la situation critique des Kanak et la correction quant à leur exclusion historique de tous les champs du progrès et notamment de celui de la sphère de l'éducation et du savoir. Il a été conclu que ce nouveau processus devrait aboutir à un référendum sur l'indépendance à la fin de l'année 2018, soit dix ans après la signature de cet accord. Cet article analyse quelques-unes des dimensions de la politique éducative de la colonisation française en Nouvelle-Calédonie, notamment le rôle de l'éducation dans la création et la reproduction des relations coloniales, le traitement des langues kanak dans l'éducation, le rendement scolaire très bas des Kanak dans le système éducatif français, ainsi que l'évolution du mouvement des écoles populaires kanak. Il examine pourquoi l'éducation coloniale a constitué une cible principale du mouvement indépendantiste kanak et l'implication des luttes au niveau du champ de l'éducation, facteur important dans les perspectives d'avenir du peuple kanak.

Mots clefs : Éducation, colonisation, Nouvelle-Calédonie. Mouvement indépendantiste. Ecole Populaire Kanak. Accords. Perspectives.

التعليم، الاستعمار والسعي من أجل استقلال كاليدونيا الجديدة
 آخر بقايا الإمبراطورية الفرنسية القوية، كاليدونيا الجديدة هي مجموعة صغيرة من الجزر في جنوب غرب المحيط الهادي التي تهيمن عليها سياسة شعب الكاناك المطالبة بالاستقلال منذ السبعينيات، مدعومة محليا من قبل انفصاليين متطرفين مناهضين للاستقلال وقد رفضت الحكومات الفرنسية المتعاقبة هذا الطلب. توجت هذه الحالة بالنزاع والعنف الخطير، الذي انتهى في نهاية عام 1988 باتفاق سلام ركز على "تطوير وإعادة التوازن" للحالة الحرجة لشعب الكاناك والإجراء التصحيحي في استبعادهم التاريخي من كل القطاعات، لا سيما في التعليم والمعرفة. اتفق على أن هذه العملية الجديدة ينبغي أن تؤدي إلى استفتاء على الاستقلال في نهاية عام 2018، بعد عشر سنوات من توقيع الاتفاق السياسي. يحلل هذا المقال بعضا من أبعاد السياسة التعليمية للاستعمار الفرنسي في كاليدونيا الجديدة، بما في ذلك دور التعليم في خلق وإنتاج العلاقات الإستعمارية، ومعاملة لغات الكاناك في التعليم، والأداء الضعيف للكاناك في النظام التعليمي الفرنسي، إضافة إلى تطور حركة مدارس الكاناك الشعبية. ويدرس السبب في أن التعليم الاستعماري كان هدفا رئيسيا في حركة استقلال الكاناك وأهمية النضالات في ميدان التعليم، وهو عامل مهم في الأفق المستقبلية لشعب الكاناك.

教育，殖民化和争取新喀里多尼亚的独立

新喀里多尼亚，这个法兰西帝国最后的残遗，是一小群位于太平洋西南部的岛屿。自 20 世纪 70 年代开始，卡纳克人民便开始寻求独立，这一愿望很大程度上主导着新喀里多尼亚的政治。但继任的法国政府受到当地的极端反独立分离主义者拥护，并拒绝卡纳克人民的主权。事态最终引发严重的冲突和暴力，直到 1988 年底签署和平协定才让其得以停息。和平协定关注卡纳市人民的“发展和重新平衡”的重要处境，并致力消除他们历史上与社会各领域的脱离，尤其是在教育和知识领域。协议认为，这一新进程应使得在 2018 年底，即在这一政治协议签署的十年之后，进行一次独立公投。本文分析了法国对新喀里多尼亚殖民化的教育政策的一些方面，包括教育如何创造和再创造殖民关系，教育如何处理卡纳克的语言，法式教育系统中卡纳克学生为何表现得不尽人意，以及卡纳克大众学校运动如何进行改革。本文还调查了殖民地教育成为卡纳克独立运动中的关键目标的原因，探讨了教育斗争对卡纳克人民的未来发展的重要性。

Education, colonization and quest for independence of New Caledonia

The last vestige of the powerful French empire, New Caledonia is a small group of islands in the South-West Pacific whose politics has largely been dominated by the Kanak people's quest for independence since the 1970s. Supported locally by an extremist, anti-independence separatists, the successive French governments rejected the sovereignty of the Kanak people. This state of affairs culminated into serious conflict and violence, which ceased at the end of 1988 with a peace agreement that focused on the "development and rebalancing" of the critical situation of the Kanak people and the corrective action in their historical exclusion from all the sectors, particularly in education and knowledge. It was agreed that this new process should lead to a referendum on independence at the end of 2018, ten years after the signing of that political agreement. This article analyzes some of the dimensions of the educational policy of French colonization in New Caledonia, including the role of education in the creation and reproduction of colonial relations, the treatment of Kanak languages in education, and the low performance of the Kanak in the French education system, as well as the evolution of the Kanak popular schools movement. It examines why colonial education was a main target in the Kanak independence movement and the significance of the struggles in the field of education, an important factor in the future prospects of the Kanak people.

Образование, колонизация и стремление к независимости Новой Каледонии

Последняя крупная мощной французской империи – Новая Каледония – представляет собой небольшую группу островов в юго-западной части Тихого океана, в политике которых с 1970-х годов преобладает стремление Канакского народа к независимости. Последовательно сменявшие друг друга французские правительства, поддерживаемые на местном уровне экстремистскими сепаратистами, выступающими против независимости, отвергали суверенитет Канакского народа. Такое положение дел завершилось серьезным конфликтом и насилием, которое прекратилось в конце 1988 года мирным соглашением, основное внимание которого уделялось «развитию и восстановлению баланса» критической ситуации народа Канака и корректирующим действиям в их историческом исключении из всех областей, особенно образования и знаний. Было решено, что этот новый процесс должен привести к референдуму о независимости в конце 2018 года, через десять лет после подписания этого политического соглашения. В данной статье анализируются некоторые аспекты образовательной политики французской колонизации в Новой Каледонии, в том числе роль образования в создании и воспроизводстве колониальных отношений, отношение к Канакским языкам в образовании, низкая успеваемость Канаков во французской системе образования, а также эволюция движения канакских народных школ. В нем рассматривается вопрос о том, почему колониальное образование было главной целью движения за независимость Канаков, а также значение борьбы в области образования, являющейся важным фактором в будущих перспективах Канакского народа.

Educación, colonización y búsqueda de la independencia de Nueva Caledonia

El último vestigio del poderoso Imperio francés, Nueva Caledonia, es un pequeño grupo de islas en el Sudoeste del Pacífico cuya política ha sido largamente dominada por la búsqueda de independencia del pueblo Kanak desde la década de 1970. Apoyados localmente por los extremistas separatistas anti-independentistas, los sucesivos gobiernos franceses han rechazado la soberanía del pueblo Kanak. Posterior a un periodo de conflicto y violencia entre las dos partes, en 1988 se llegó a un acuerdo de paz que se centró en el “desarrollo y reequilibrio” de la crítica situación del pueblo Kanak y la acción correctiva en su exclusión histórica en todos los sectores, particularmente en la educación y el conocimiento. Se había acordado que este nuevo proceso debería llevar a un referendo sobre la independencia a fines de 2018, diez años después de haber firmado ese acuerdo político. Este artículo analiza algunas de las dimensiones de la política educativa de la colonización francesa en Nueva Caledonia, incluyendo el papel de la educación en la creación y reproducción de las relaciones coloniales, el tratamiento de las lenguas Kanak en la educación, y el pobre desempeño del Kanak en el sistema educativo francés, así como la evolución del movimiento de las escuelas populares de Kanak. Finalmente, el artículo examina por qué la educación colonial fue un objetivo principal en el movimiento de independencia de Kanak y la importancia de las luchas en el campo de la educación, un factor importante en las perspectivas futuras del pueblo Kanak.

Introduction

Dans ce qui suit, nous nous proposons de faire un bref tour d’horizon sur les rapports des Kanak¹ d’hier et d’aujourd’hui avec la colonisation française, d’analyser le rôle joué par l’éducation coloniale dans la création du mouvement indépendantiste kanak qui s’était levé contre les discriminations véhiculées par cette éducation. Nous nous pencherons sur l’action du boycott de cette dernière par le mouvement indépendantiste kanak. Utilisant une approche historique, nous examinerons quelques-uns des impacts de l’éducation coloniale sur le peuple kanak en Nouvelle-Calédonie. Nous verrons en particulier comment celle-ci a, en grande partie, poussé elle-même les Kanak à se soulever contre le colonialisme et ce, malgré son travail de dépersonnalisation de l’identité kanak et du renforcement de la culture française au détriment de celle des indigènes. Comment a-t-elle façonné les esprits kanak dans le sens contraire de ses propres buts ? Comment a-t-elle ouvert malgré elle, des perspectives prometteuses pour la population locale, ce qui était tout à fait inattendu par ses propres objectifs ? Comment a réagi le mouvement indépendantiste qui s’est attaqué en priorité aux dimensions éducatives de cette école dans le passé et au présent ? Quels sont en fait les schémas que reproduisaient ces dernières ?

Nous analyserons également les causes de la démobilisation du mouvement indépendantiste, de l’échec de son initiative de création des Ecoles Populaires Kanak et aussi, *a posteriori*, son influence sur l’esprit de la population kanak. Nous traiterons enfin de compte un élément essentiel dans les enjeux à venir, celui de la place de l’enseignement des langues kanak dans le système éducatif selon les Accords établis entre les Kanak et le gouvernement français ainsi que les difficultés et les obstacles de leur mise en place dans la réalité du système éducatif en Nouvelle Calédonie. Réalité dominée encore par les stéréotypes, les préjugés, les discriminations et une forte résistance de l’esprit résiduel colonial.

¹ Avant que les militants ne le revendiquent, le terme « Kanak » servait uniquement d’insulte dirigé envers le peuple autochtone mélanésien en Nouvelle-Calédonie. Bien que l’écriture française soit « Canaque », le peuple Kanak réclame l’épellation invariable de « Kanak » afin de subvertir l’hégémonie de la langue coloniale. Le terme invariable « Kanak » est désormais d’usage dans les documents officiels, notamment l’Accord de Nouméa.

1. Deux mondes en totale opposition dans le contexte de la colonisation

D'ores et déjà, il nous faut signaler l'existence en Nouvelle Calédonie de deux mondes situés dans le même espace, qui se côtoient mais qui sont en réalité séparés par un mur virtuel érigé dans les esprits. Sur le même lieu, les deux destins sont différents et s'opposent notamment au niveau de l'éducation formelle qui fonctionne à deux vitesses, celle de la population coloniale riche et orientée vers le progrès et celle des indigènes, pauvre et stagnante quant au développement souhaité. Une image frappante symbolise cette séparation dans le même espace géographique assez restreint. Sur le chemin vers l'Université de Nouvelle-Calédonie (UNC), juste après avoir traversé la digue - qui a transformé Nouville en péninsule artificielle dans les années 1970 - se trouve le Camp Est où se niche la prison.

À deux pas l'une de l'autre, sur la même voie, dans un endroit - qui était à l'origine une île retenant les condamnés au bagne français ou des pays colonisés, expédiés par la France au XIX^e siècle - se côtoient deux institutions sociales aux fonctions très différentes, pour ne pas dire, totalement opposées. Elles ont été créées et façonnées par le contexte colonial. L'une, est une prison, l'autre c'est l'Université de Nouvelle Calédonie (UNC). La population kanak ne connaît que trop la prison du Camp Est pour l'avoir souvent fréquentée en tant que pourvoyeuse de fidèles pensionnaires. Cette prison a abrité entre autres individus kanak, une clientèle importante des membres du mouvement indépendantiste qui ont osé revendiquer la dignité et la liberté pour eux-mêmes et pour les leurs. Cette même population n'est cependant pas familière avec l'UNC, ce haut lieu du savoir, de la connaissance et de la reconnaissance sociale, dit « université » qui lui, est chargé de transmettre les qualifications auxquelles très peu d'individus kanak pouvaient et peuvent encore y prétendre.

Dénonçant entre autres discriminations cette réalité frappante qui, sans vouloir exagérer, se formulerait ainsi : « les Kanak en prison, l'université pour les enfants des Colons ! », les Kanak se soulevèrent contre toutes ces injustices et réclamèrent leur indépendance. Les hostilités prirent fin parce que des accords ont été conclus avec le gouvernement français. Un vote est prévu prochainement pour décider du sort de ce pays situé très loin de la France, dont la population discriminée par l'éducation française, est vouée à la misère et aux punitions individuelles et collectives (90^o/° des prisonniers sont kanak !).

Entourée de nations indépendantes dans le Pacifique sud-ouest, la Nouvelle Calédonie, reste aujourd'hui encore sous le contrôle de la France. Il faut reconnaître que proportionnellement, les Kanak n'ont pas été réduits à une population minoritaire au même point que les populations indigènes des anciennes colonies anglaises de l'Australie par exemple (les Aborigènes : 3,3%), ou de la Nouvelle-Zélande (les Māori : 14,9%). Ils comptent 39% de la population globale selon le dernier recensement de 2014, la proportion la plus faible depuis le début des enregistrements. Face à une population de Colons massivement opposée à leur indépendance comme dit plus haut, ils appréhendent avec beaucoup d'anxiété ce référendum sur l'autodétermination qui aura donc lieu le 24 novembre 2018 et qui décidera de leur avenir.

La colonisation française de la Nouvelle-Calédonie commença officiellement le 24 septembre 1853. Outre l'exploitation de sa richesse minière extraordinaire et sa valeur stratégique dans cette région largement anglophone, l'objectif principal de l'occupation, était de convertir les îles en colonie pénitentiaire. À la fin du XIX^e siècle, 21.600 condamnés y ayant été expédiés. La France a fini par mettre fin à sa politique de déportation, elle encouragea néanmoins la migration libre des colons et considérant que la population indigène comme un obstacle à la colonisation, elle adopta envers elle une stratégie coloniale des plus brutales.

Ainsi, sur l'île principale, la *Grande Terre*, les communautés kanak ont été chassées de leurs terres et confinées dans de petites réserves infertiles dans des vallées isolées et inaccessibles.

En 1878, la résistance kanak s'est transformée en une révolte coordonnée contre un régime colonial qui, selon un rapport officiel du général Arthur de Trentinian, « n'avait aucun souci des indigènes, et ne songeait nullement à les administrer avec un peu de justice » (Dousset, 1970: 135). À partir de 1887, la France a exercé son autorité sur le peuple kanak grâce à une série de mesures répressives connues sous le nom de « Code de l'Indigénat » qui était d'ailleurs appliqué dans d'autres contrées qu'elle a colonisées. Ces lois interdisaient aux Kanak de quitter leurs réserves, imposaient un régime de travail forcé et instauraient des sanctions sévères contre les transgresseurs, comme ce fut le cas par exemple dans ses colonies d'Afrique et notamment en Algérie conquise en 1930. Décrivant l'impact de cette politique, le Sénat Coutumier, l'interlocuteur kanak institutionnel qui a été créé par l'Accord de Nouméa, a rédigé en 2014 la Charte du Peuple kanak en déclarant que « la colonisation a frappé la totalité des chefferies du pays Kanak. Dans pratiquement toutes les régions de la *Grande Terre*, la violence de la colonisation a engendré la disparition de clans et de chefferies, le déplacement de tout ou partie de populations de tribus et des régions entières. Les traumatismes de ces violences ont marqué durablement les structures coutumières et les hommes qui les habitent » (*Charte du Peuple Kanak*, 2014: 4). Les Kanak se sont rebellés contre la domination coloniale tout au long de la seconde moitié du XIX^e siècle et aussi en 1917. Ces soulèvements ont été farouchement réprimés et affaiblis. Au fil du temps, ils ont comme perdu la capacité de résister et de se soulever. D'autant plus qu'après la seconde guerre mondiale, la France a libéralisé ses relations avec toutes ses possessions d'Outre-mer. En Nouvelle-Calédonie, cette approche a abouti à l'abrogation du *Code de la loi indigène* et à l'assouplissement des restrictions formelles qui empêchaient l'intégration sociale des Kanak. Dans les années 1950, pour la première fois, tous les adultes kanak ont été autorisés à voter. En 1953, l'école primaire fut rendue gratuite et obligatoire et, en 1956, les étudiants kanak furent autorisés pour la première fois à fréquenter une école secondaire publique. Ces réformes politiques ont eu lieu dans un contexte de « pacification » du peuple kanak. En 1953, lors des événements marquant un siècle de colonisation, on remarquait qu'à l'exception de Saint Pierre et Miquelon, la Nouvelle-Calédonie était une colonie française sans risque de révolte nationaliste (*Le Calédonien*, 21 juillet 1953).

2. L'éducation coloniale

Pendant cette période, l'enseignement primaire pour la plupart des enfants kanak avait lieu dans leurs zones tribales, dans des écoles de qualité médiocre. Cet enseignement était sous-financé et était assuré par de jeunes moniteurs kanak sans formation pédagogique ni d'ailleurs expérience quelconque. Ils étaient chargés de transmettre un programme importé de la France en utilisant une langue d'instruction qui n'était pas la leur. Hninö Wéa, décrit la situation à son arrivée dans l'une de ces écoles de la tribu de Wawé dans les années 1960, pour diriger une école à charge unique. Il dit qu'il était un jeune homme qui ne disposait que d'un certificat d'études primaires et sans aucune formation d'enseignant. Il revenait alors dans sa tribu et témoigne ainsi : « Je suis allé voir les parents pour leur dire que j'étais là pour enseigner à l'école. Je ne savais même pas qui il fallait voir dans la tribu... Je ne connaissais personne. Je ne connaissais même pas la région. J'étais un étranger total là-bas. Je suis kanak, mais j'avais seulement 18 ans et je ne savais rien du tout de cette région. Tout ce que je pouvais faire était de faire mon possible » (Mentionnée dans *Small 1994*: 120).

Les 15 élèves de l'école avaient entre cinq et douze ans. Les plus jeunes ne parlaient pas du tout le français et leur langue (Neku) et celle de Hninö (Iaai) étaient mutuellement incompréhensibles. L'école se composait d'une salle de classe faite de paille et de terre avec un nid de guêpes dans le mur et des trous dans le toit. Wéa n'avait aucune aide pédagogique ni aucun contact avec les autorités éducatives; il ne recevait que la visite occasionnelle du

gendarme le plus proche pour s'assurer qu'il n'avait pas abandonné son poste, comme c'était souvent le cas à l'époque pour beaucoup de moniteurs isolés et désillusionnés.

L'accès accru des élèves kanak à ce type de scolarité ne s'est pas traduit par un succès scolaire. Ce n'est qu'en 1962 que le premier Kanak passa le baccalauréat. Seule une poignée de Kanak a réussi à entrer à l'université en France durant ces premières années. Ils n'étaient pas en équilibre avec leur origine et leur culture. L'un d'entre eux, Nidoish Naisseline, a formulé par écrit une attaque cinglante envers l'éducation coloniale en Nouvelle-Calédonie dans le premier numéro du *Canaque. Homme Libre*, il écrit : « la communauté blanche bafoue l'homme de couleur partout où elle le rencontre. Elle ridiculise ses parents aux yeux du petit indigène en les rendant coupables de n'avoir pas fait de lui un descendant d'Astérix. A l'école la mère idéale est toujours représentée par une blanche. Étant petits, mes camarades et moi évitions d'être vus par M. l'instituteur en compagnie de nos parents; ceux-ci ayant fini par représenter pour nous, grâce à l'école française, tout ce qu'il fallait fuir, oublier pour devenir un homme véritable, une personne. » (Naisseline, 1969: 5-6).

Quelques mois après la parution de ce Bulletin, Naisseline fut renvoyé en Nouvelle-Calédonie où il a fondé *Les Foulards Rouges*. Les jeunes adhérents à ce groupe ont lancé le premier défi au colonialisme depuis les rébellions cinquante ans plus tôt. Ils ont récupéré et revalorisé le mot «Kanak» qui avait auparavant été utilisé uniquement comme une insulte contre le peuple mélanésien indigène de Nouvelle-Calédonie. Au cours des années 1970 et au début des années 1980, les Kanak se sont levés contre l'éducation française, qu'ils considéraient non comme un moyen de développement individuel ou social, mais comme un instrument de domination et de contrôle colonial. *Le Groupe 1878*, l'un de ceux des indépendantistes, né des *Foulards Rouges*, a noté ceci : « nous avons reçu une éducation à la domination, c'est-à-dire une éducation qui ne tenait pas compte de la manière de penser et d'agir des populations locales mais orientée de telle sorte que le passé traditionnel ne soit pas souligné » (*Andi Ma Dhô*, juillet 1976)

À la fin des années 1970, deux grandes campagnes ont mis au premier plan de la lutte anticoloniale les questions éducatives. La première était l'occupation prolongée en 1976-78 du Foyer Calédonien à Paris par des étudiants kanak. Peu de temps après, de 1979 à 1981, une série prolongée de mobilisations et d'affrontements a éclaté à Nouméa en réaction au licenciement des professeurs kanak ou pro-kanak, qui ont défié l'établissement scolaire en Nouvelle-Calédonie. Ces actions, ainsi que le mouvement politique plus large dont ils sont issus, ont alimenté un niveau accru de la conscience politique kanak. Il est largement reconnu par les chercheurs de cette période - par exemple Dornoy (1984) et Ward (1982) - qu'en dehors des revendications foncières, l'éducation était la cible la plus importante de la résistance kanak. De plus en plus, les militants kanak constataient que, loin de donner à la population indigène de réelles possibilités de mobilité sociale, le système éducatif en Nouvelle-Calédonie était une institution qui reproduisait les inégalités de la société capitaliste raciste. Au moment où les boycotts scolaires commençaient à prendre de la force en 1979, dans une édition spéciale du *Bulletin Kanak* intitulé «*A bas l'école bourgeoise*», on écrivait: « en Nouvelle-Calédonie, nous vivons dans une société raciste et capitaliste. Le rôle de l'école dans ce contexte est de préparer les enfants à s'intégrer dans cette société, qui tous les jours injurie le Kanak. Le système capitaliste a beaucoup plus besoin d'ouvriers et de manoeuvres que de cadres supérieurs; c'est pour cela que l'école sélectionne et ne permet la réussite qu'à un petit nombre de privilégiés destiné plus tard à être des cadres); les autres iront à l'usine ou travailleront comme employés. Dans une société inégalitaire, l'école favorise et accentue les inégalités.» (*Kanak. Journal de Liberation*. 14 septembre 1979)

En 1984, la plupart des partis et groupes favorables à « l'indépendance kanak et socialiste » se sont réunis pour créer le *Front de Libération Nationale Kanak et Socialiste* (FLNKS). Le

FLNKS a adopté une politique de perturbation contre les structures et institutions coloniales. Cette stratégie de rupture a commencé avec le boycott actif des élections territoriales de novembre 1984 et l'occupation des terres contestées.

3. Au-delà du boycott de l'éducation coloniale et les obstacles rencontrés par l'EPK

En février 1985, le FLNKS a étendu le boycott à l'éducation. Non seulement il appelait les partisans à boycotter les écoles coloniales françaises, mais il annonçait également la création d'un système alternatif d'Ecoles Populaires Kanak (EPK) qui fonctionnerait de manière cohérente avec les objectifs politiques, économiques et culturels du FLNKS. L'EPK a lancé 46 écoles, engageant 246 animateurs bénévoles, travaillant avec 1500 élèves, soit 6% des 25000 élèves kanak inscrits dans les écoles du territoire. Certains EPK représentaient la majorité des élèves dans leur région, tandis que d'autres se trouvaient dans des situations assez marginales. Les installations de chaque EPK étaient organisées localement. La construction de bâtiments et la fabrication de bureaux et de chaises étaient une activité communautaire. Dans certains cas, des bâtiments scolaires tels que des salles de classe et des aires de cuisson et des cantines, ont également été construits localement, même si un certain nombre d'EPK occupaient des bâtiments qui avaient été utilisés auparavant par le système scolaire colonial.

L'EPK voyait dans les écoles coloniales le canal des Kanak vers les positions sociales les plus basses - « les bidonvilles, les réserves, les chômeurs ». Les Kanak perdaient progressivement leurs moyens indépendants de promotion sociale et devenaient dépendants de la société coloniale. Selon l'EPK: « L'école coloniale favorise l'échec scolaire des enfants kanak..., elle ignore totalement les besoins réels du pays jusqu'à aliéner les mentalités pour faire du peuple kanak, un peuple du pays, un pays voué à l'hégémonie culturelle de l'impérialisme français » (EPK, 1985). L'EPK a fermement rejeté l'objectif du système scolaire colonial visant à encourager les élèves à s'identifier et à admirer les réalisations de la nation française. Les notions de citoyenneté définies par la France qui étaient générées et renforcées chez les Kanak dans les écoles coloniales sapaient à la fois le désir de lutter pour l'indépendance et les types de valeurs et d'attitudes qui seraient nécessaires à la construction d'un nouvel Etat kanak indépendant. Simon Naaoutchoué, un des leaders de l'EPK et Ministre de l'Éducation dans le « Gouvernement de Kanaky » du FLNKS, a déclaré: « Nous savons que le but français est d'emprisonner les esprits de nos enfants; pour les faire penser en ligne droite à la France et nulle part ailleurs » (Mentionnée dans *Small 1994: 225*).

L'EPK a cherché à redéfinir la scolarité afin qu'elle puisse servir les intérêts du peuple kanak. Ce faisant, il essayait de construire un nouveau système éducatif qui favoriserait deux objectifs: contribuer d'une part à la lutte pour atteindre l'indépendance kanak et socialiste, et d'autre part préparer les gens pour qu'ils prennent leur place dans un futur Etat kanak indépendant. Il faut signaler qu'au sein des EPK on savait que les initiatives éducatives ne pouvaient, à elles seules, générer le changement fondamental recherché: « L'EPK, comme toute école ne peut changer à elle seule la société dans son entier. La société se change par le changement de toutes les composantes de la société. Mais dans la lutte de libération du peuple kanak, l'EPK a une fonction qui dépasse les simples fonctions de l'école coloniale » (*Bwenando*, 5 septembre 1985: 9). Pour l'EPK, le point de départ qui est le principal point de référence pour l'ensemble du processus éducatif, doit viser l'éducation traditionnelle kanak. L'EPK s'est défini un rôle actif dans la reproduction de la base culturelle de la société kanak. Il voulait doter les générations émergentes de valeurs et d'attitudes dont la société kanak aurait besoin pour s'épanouir, tout en préparant les individus à se sentir à l'aise et à fonctionner efficacement au sein de cette société.

L'EPK était cependant confrontée à de nombreux types de difficultés. L'autorité éducative du territoire - le Vice-Rectorat - exerçait des pressions sur ses employés ou anciens employés dont les enfants ont déserté l'école coloniale. Dans certains cas, il a offert des moyens financiers importants pour encourager les animateurs EPK à revenir au système scolaire français. Les parents kanak ont été menacés de licenciement par leurs employeurs à moins qu'ils retirent leurs enfants de l'EPK (Néchéro-Jorédié, 1988). Ils se sont également vu refuser l'allocation pour les enfants et les soins médicaux subventionnés par l'État, au motif que les services sociaux liés à l'enfance étaient subordonnés à la fréquentation de l'école, telle que conçue par l'État français. L'EPK n'étant pas reconnue comme une école légitime, les enfants qui la fréquentaient ont été officiellement classés comme des enfants qui faisaient l'école buissonnière.

L'imposition de difficultés financières intenses à des parents déjà pauvres, a été aggravée par le manque de ressources des EPK elles-mêmes. Cela a empêché l'EPK d'acheter par exemple du matériel pédagogique. Ce qui a servi comme preuve du bien-fondé des critiques contre ces écoles et les efforts voulant dissuader les gens d'envoyer leurs enfants à l'EPK. Comme l'a souligné Naaoutchoué, le manque comparatif de ressources a rendu difficile à l'EPK de se présenter comme une alternative crédible aux parents. « Il y avait tout le système scolaire conventionnel qui continuait à fonctionner avec tout leur argent et leur matériel contre l'EPK qui n'était que quelques groupes d'animateurs » (Small 1994: 233).

Les tentatives de l'EPK d'obtenir des financements de développement des ONG régionales ont été minées par le refus des banques de Nouméa qui refusaient de débloquer des fonds pour les écoles, et par des gouvernements de la région qui refusaient les subventions des ONG destinées aux EPK. Un document obtenu du Ministère des Relations Extérieures et du Commerce (MERT) de Nouvelle-Zélande, stipulait que « le gouvernement français a fait connaître sa forte opposition au travail de l'EPK qui est fortement politique et en tant que tel dépasse le domaine de l'éducation ».

L'opposition au sein du FLNKS n'était pas moins difficile pour l'EPK. La raison pour laquelle le FLNKS a décidé de mettre fin à sa campagne de boycott active en 1985, était la canalisation des ressources vers d'autres structures de résistance et de développement. Cependant, l'EPK a trouvé qu'il était presque impossible d'obtenir des fonds des gouvernements régionaux contrôlés par le FLNKS. Selon Déwé Gorodey, bien que l'EPK de Ponerihouen qu'elle avait contribué à créer ait reçu de l'argent de leur administration régionale en 1985, le financement n'a été disponible qu'en 1988, leur EPK ayant été contrainte de fermer quelques semaines plus tôt.

Les divisions internes du FLNKS par rapport à l'EPK se sont avérées particulièrement dures. L'une des principales causes de tension à un stade précoce, était que de nombreuses personnalités au sein du FLNKS, y compris certaines qui plaidaient en faveur de l'EPK, n'envoyaient pas leurs propres enfants à l'EPK, et ne participaient en aucun cas, au boycott du système de l'école coloniale. Ce fut une source de frustration intense car cela rendait plus difficile la tâche de l'EPK de rassurer les parents en leur proposant une option éducative sérieuse pour leurs enfants. À Poindimié, certains militants du FLNKS ont tellement ressenti la non-participation des dirigeants de l'EPK qu'ils ont brûlé leur propre EPK ! Commentant l'action, la militante kanak, Susanna Ouneï-Small, a fait remarquer qu'« ils ne voulaient pas voir les enfants des tribus être amenés à l'EPK pour apprendre le nom de tel ou tel arbre, alors que certains des dirigeants du FLNKS continuaient à envoyer leurs enfants dans les écoles coloniales pour apprendre à leur donner commandes dans le futur. » (Small, 1994: 237).

L'une des déclarations les plus claires d'opposition à l'EPK émanant du mouvement indépendantiste se trouve dans un document interne préparé par les dirigeants de la Région des îles *Loyauté de l'Union Calédonienne* (UC), le plus grand parti du FLNKS. Ce document décrit

la stratégie FLNKS de 1984-85 dans laquelle on remarque qu'« il était hors de question de couper le cordon ombilical avec la France (c'eut été suicidaire), mais de pleurer plus fort pour qu'elle soit attentive et prévenante ». Il se réfère à la campagne qui « a été mise en oeuvre avec bonheur mais qui a engendré des dérapages ou “bavures” difficiles à rattraper. L'EPK, qui est plus un slogan politique qu'une institution véritable, est considérée comme l'une de ces “bavures”». Rédigé vers la fin de 1985, à une époque où l'EPK était à son apogée, le document représente un rejet de l'EPK et, à bien des égards, une approbation de l'éducation coloniale: « Écoles de lutte, ces EPK n'ont pas réussi à ébranler l'école coloniale, par manque de maturité comme également de stratégie et de tactique ... Comment donc tout homme doué de raison peut-il daigner une seconde “sacrifier” son enfant et ce pour satisfaire un slogan politique, un fanatisme aveugle, une idéologie utopiste ? »

« Les tenants de l'école coloniale au contraire, croient aux vertus des réformes... De plus, la compétition internationale, voire mondiale, exige que l'on soit défendu par des représentants sérieux et surtout **compétents** (souligné dans l'original)... L'apprentissage du français, outre sa vertu pour nous ouvrir des horizons nouveaux, de nous donner accès à une connaissance supérieure, à une certaine notion de liberté, a l'appréhension du monde, est aussi un atout non négligeable (sic), sinon le principal, une sécurité pour réussir une bonne indépendance ». (*Chronique de Kanaky*, Circa 1991: 9-11).

4. Stratégies de lutte, démobilisation du mouvement indépendantiste et les Accords

Le document révèle une foi profonde dans la supériorité de la société française et du système éducatif sur lequel elle repose. Il montre ainsi que, au sein d'un mouvement d'indépendance radicale, on pouvait trouver des perspectives profondément conservatrices. Cependant, l'opposition interne à l'EPK ne se limitait nullement à l'UC et n'était pas non plus toujours le reflet d'une idéologie conservatrice. Elie Poigoune et Paul Néaoutyine, deux des critiques les plus virulentes de l'EPK, étaient des personnalités de premier plan au sein du Parti de Libération Kanak (PALIKA), l'un des partis les plus radicaux du FLNKS. Ce fut le renvoi de Néaoutyine de son poste d'enseignant et la démission de Poigoune, lui exprimant ainsi son appui, qui a déclenché les protestations militantes et les boycotts de l'école de 1979.

Poigoune a fait valoir que la création de l'EPK n'avait pas été suffisamment pensée pour en faire un système scolaire pour l'ensemble de la population et qu'il était irresponsable d'appeler les gens à participer à un exercice essentiellement expérimental sans préparation adéquate. Il a également insisté sur le fait que le système scolaire existant était un point de départ utile pour un système d'éducation après l'indépendance et que c'était une erreur de rejeter consciemment tout ce qu'il contenait et d'essayer d'établir un nouveau système à partir de zéro. En dépit de ses dimensions pro-coloniales, a souligné Poigoune, il y avait dans le système éducatif français des éléments importants que les Kanak peuvent prendre et utiliser à leur avantage. Il a estimé qu'il était important que les étudiants kanak soient envoyés en France pour l'enseignement supérieur, tout en insistant sur le fait qu'« il est vrai que l'école est le lien privilégié où se diffuse l'idéologie bourgeoise et colonialiste mais elle peut aussi, si nous le voulons bien, être une arme redoutable qu'on peut utiliser contre le colonialisme et pour parvenir à notre libération » (*Kanak*, N°128, 1988: 11).

La question reste cependant de savoir ce qu'une telle stratégie promettait pour la majorité des jeunes kanak qui ont été éliminés du système éducatif bien avant le niveau tertiaire. De plus, l'acceptation par Poigoune de la position de la France comme source de savoir et de compétences analytiques, rend encore plus compliquée la tâche déjà difficile de rompre avec

le type de mentalité exprimée dans le document UC précité, conditionné par l'expérience coloniale et la persistance de soutenir les relations de pouvoir coloniales.

Poigoune a également critiqué la préoccupation de l'EPK concernant la coutume et la culture kanak. Il a soutenu que la culture et les traditions font bien partie de la famille et du milieu traditionnel. Bien que favorable à la préservation et à la promotion des biens de la société traditionnelle, Poigoune insiste sur le fait qu'ils ne sont pas des matières scolaires. Cette préoccupation était partagée par d'autres militants qui se méfiaient de permettre le contrôle par l'État des aspects cruciaux de la culture et de l'identité kanak. Un groupe de Kanak qui travaillait à la promotion des langues kanak, nourrissait des inquiétudes quant au rôle central que les écoles, contrairement aux parents, assumaient dans la réhabilitation des langues kanak. Ils ont identifié un certain nombre de « problèmes inhérents » dans les démarches post-Matignon pour incorporer les langues kanak dans le curriculum. Parmi eux, on trouve la « réticence des anciens vis-à-vis de l'écrit qui fossilise la parole: la parole c'est la vie; sentiments d'usurpation des prérogatives et du rôle des vieux, détenteurs du savoir traditionnel et crainte de la dévalorisation de ce savoir par son introduction à l'école et la prise en charge par des enseignants, vecteurs d'un savoir occidental mais ne maîtrisant pas toutes les données de leur propre culture » (Waheo et al. 1989 : p.50).

Poigoune soutenait, comme il l'avait fait depuis que le défi radical du système éducatif avait pris de l'ampleur dans les années 70, que la véritable tâche de l'organisation de la résistance éducative devait se faire au sein des institutions existantes. Le système colonial, a-t-il souligné, préférait de loin voir des militants établir des structures parallèles comme l'EPK plutôt que de les engager dans un syndicat fort et bien organisé.

En tant que voix dissidente, Poigoune était en minorité et était régulièrement pris au dépourvu sur la question, en particulier compte tenu de sa propre position en tant que professeur diplômé. Bien que certains anciens membres de l'EPK aient pu reprendre une carrière d'enseignant, les sacrifices consentis par beaucoup d'autres pour leur participation à l'EPK se sont révélés irrémédiables. De plus, l'amertume persistait chez certains militants qui, en 1979, abandonnaient leurs études à la suite d'un engagement politique dans la campagne de boycott des écoles coloniales, dont Poigoune était une personnalité de premier plan.

Ces points de vue contradictoires sur l'EPK et l'éducation révèlent plus largement un profond désaccord idéologique, analytique et stratégique au sein du mouvement indépendantiste. Contradictions que les Accords avec le gouvernement français, dits de Matignon du 26 juin 1988 ont mises en évidence. En acceptant d'abandonner la stratégie de rupture, le FLNKS a finalement annoncé la fin de l'EPK en tant que mouvement populaire. Les Accords ont supprimé le cadre politique dans lequel l'EPK avait pu fonctionner après la décision de participer au système régional mis en place en 1985. L'EPK était conçue et ne pouvait fonctionner correctement que comme un élément d'une mobilisation populaire. Or cette mobilisation avait pris fin.

Lorsque le président du FLNKS, Jean-Marie Tjibaou, a conclu l'accord, il savait qu'il se mettait dans une situation délicate. Les Accords de Matignon, ont été signés seulement cinquante-deux jours après ce qu'on a appelé le «massacre d'Ouvéa». Dans les jours qui ont précédé le second tour de l'élection présidentielle française, le Premier Ministre Jacques Chirac, qui se dressait contre le président sortant François Mitterrand, voulait mettre fin à une situation de prise d'otages sur l'île d'Ouvéa qui sapait sa campagne électorale. Malgré les négociations en cours pour une résolution pacifique de la crise, il a choisi de lancer une attaque qui a entraîné la mort de 19 militants kanak. Certains étaient morts sous la garde de l'armée française après avoir été faits prisonniers. On a également affirmé que des villageois civils auraient été torturés.

Au premier anniversaire du massacre d'Ouvéa, Tjibaou et son adjoint, Yeiwéné Yeiwéné, ont été assassinés à bout portant par Djubelly Wéa, un militant éminent d'Ouvéa qui s'opposait résolument aux Accords et était amer de voir que personne n'ait été tenu responsable des 19 morts. Wéa fut alors lui-même abattu. En quelques minutes, les dissensions dans le mouvement indépendantiste ont coûté la vie à trois leaders expérimentés, talentueux et engagés. Ironiquement, la tentative désespérée de Wéa de faire dérailler les Accords, a eu l'effet inverse. Ceux qui ont partagé son opposition aux Accords ont été marginalisés et réduits au silence. De même, la reconnaissance des Accords a été massivement renforcée par la reconnaissance de membres qui soutenaient l'indépendance et qui ont maintenu l'élan généré par Tjibaou qui incarnait, de manière métonymique, les Accords.

Les Accords ont été approuvés par leurs différents signataires pour des raisons divergentes. Le Premier Ministre Rocard estimait que ces Accords constituaient un cadre pour ce qu'il appelait « une véritable décolonisation économique et culturelle sans changement de la souveraineté » (Reuters, 28 août 1988). Il pensait qu'au bout de 10 ans, les Kanak qui réclamaient l'indépendance, viendraient à en comprendre les avantages de demeurer français. « Mon souhait le plus cher », a-t-il dit, « est qu'en 1998 les populations de Nouvelle-Calédonie choisissent de rester dans l'ensemble français » (Reuters, 29 août 1988).

Les habitants de Nouvelle-Calédonie étrangers aux Kanak, sont un mélange multiethnique de Caldoches (Européens ou métis de plusieurs générations) et d'immigrants de France et d'autres parties de l'empire français, y compris l'ancienne colonie de l'Algérie - dont les anciens déportés qui sont restés sur place après la suppression des bagnes, se sont mariés et fondus dans la population indigène - et les territoires français de la Polynésie Française et de Wallis et Futuna. Beaucoup d'entre eux, sont opposés à l'indépendance de la Nouvelle-Calédonie. Le principal parti contre l'indépendance, dont le président, Jacques Lafleur, signataire des Accords de Matignon, était le Rassemblement pour la Calédonie dans la République (RPCR). Trois heures et demie seulement ont suffi pour approuver à l'unanimité ces Accords. Lafleur a salué l'acceptation de ces derniers par Tjibaou, le décrivant comme l'un des Mélanésiens qui ont une conception économique, qui travaillent à faire avancer les choses et à oublier les conflits. Le RPCR espérait que les Accords rendraient la stabilité aux îles.

Le FLNKS s'était profondément divisé. Il a fallu à Tjibaou deux congrès de débats houleux et une promesse d'essayer d'obtenir plus de concessions lors du dernier round des négociations à Oudinot le mois suivant, pour convaincre le FLNKS d'accepter les Accords. Tjibaou a estimé que ces Accords étaient la meilleure solution compte tenu du déséquilibre du pouvoir à l'époque. Il a indiqué que « ce plan ne correspond pas à nos objectifs, mais nous devons voir dans quelle mesure nous pouvons le faire fonctionner pour nous. Tous nos militants soutiennent l'indépendance kanak et socialiste ; cependant, avant de l'acquérir, nous devons vivre » (Agence France Presse, 25 juillet 1988). Tjibaou avait subi une perte personnelle directe pendant la lutte. En 1984 deux de ses frères étaient abattus ensemble avec huit autres Kanak dans une embuscade montée par des Colons. Les auteurs de l'attaque ont été acquittés au motif qu'ils agissaient en légitime défense.

Les Accords de Matignon ont créé un changement radical pour le mouvement indépendantiste. Sa base militante a été largement démobilisée. La stratégie a engagé le mouvement à long terme à coopérer avec le gouvernement français et à investir dans le développement social, culturel et économique. Mais la décision dans les Accords de remettre à plus tard le référendum sur l'indépendance, a été critiquée par de nombreux militants kanak. En 1998, les deux parties signataires des Accords ne voulaient pas d'un référendum immédiat et définitif. D'une part, le FLNKS savait qu'il n'avait pas le nombre votants nécessaire pour l'emporter. D'autre part, ceux

qui étaient contre l'indépendance ne voulaient pas risquer un retour aux perturbations des années 1980 si le vote allait à l'encontre de l'indépendance.

Sur la base de ces craintes, les parties ont signé l'Accord de Nouméa. Le préambule reconnaît que « la colonisation a porté atteinte à la dignité du peuple kanak qu'elle a privé de son identité. Des hommes et des femmes ont perdu dans cette confrontation leur vie ou leurs raisons de vivre. De grandes souffrances en sont résultées. Il convient de faire mémoire de ces moments difficiles, de reconnaître les fautes, de restituer au peuple kanak son identité confisquée, ce qui équivaut pour lui à une reconnaissance de sa souveraineté, préalable à la fondation d'une nouvelle souveraineté, partagée dans un destin commun.»

Il affirme également que la décolonisation est le moyen de reconstruire les liens sociaux « en permettant au peuple Kanak d'établir avec la France des relations nouvelles correspondant aux réalités de notre temps» (Accord sur la Nouvelle-Calédonie, 1998). C'est l'Accord de Nouméa qui a fait référence officielle pour la première fois à la Nouvelle-Calédonie en tant que « pays » (et pas uniquement un « territoire »). Il différencie « le peuple kanak » du « peuple français » et crée un nouveau statut de citoyenneté qui constitue la base des droits de vote différentiels entre les résidents de longue durée et les immigrants plus récents. Ce principe est conforme aux directives de l'ONU sur ces votes mais il est vivement contesté par les groupes anti-indépendantistes en Nouvelle-Calédonie et en France. Il a même provoqué des contestations au Conseil Constitutionnel de Paris, la plus haute cour constitutionnelle de France (voir Maclellan 2010). Le vote lui-même a été repoussé de 20 ans et devrait avoir lieu avant la fin de 2018. Les nouvelles mesures de l'Accord de Nouméa comprennent la reconnaissance des droits fonciers coutumiers, la création d'un Sénat Coutumier composé de chefs kanak et le soutien aux langues kanak dans le système éducatif et dans la société. Mais, cela concerne ce qui est écrit. La réalité est autre. Marie Salan a par exemple été étonnée de découvrir en 2006 qu'une académie des langues « quoique prévue dès 1998 par l'Accord de Nouméa, n'avait d'existence autre que sur le papier » (Salan et Bourdieu 2010:81). Finalement en 2007, l'Académie des Langues kanak a été créée pour promouvoir le développement de toutes les langues et les dialectes kanak dans une variété de contextes au-delà du système éducatif (Wacalie, 2010). L'Accord de Nouméa a également étendu les dispositions du programme « 400 Cadres » mis en place sous les auspices des Accords de Matignon. Le nouveau programme a été renommé « Cadres Avenir ».

Un aspect essentiel des Accords de Matignon et de l'Accord de Nouméa était l'engagement de la France de répondre aux griefs éducatifs des indépendantistes, promettant d'apporter des améliorations à l'éducation et à la formation des Kanak en Nouvelle-Calédonie. Le Premier Ministre Rocard a décrit l'objectif pédagogique des Accords Matignon ainsi : il « permettra de jeter les bases d'une véritable politique de formation, afin de rattraper les retards et de corriger les déséquilibres que traduit la trop faible présence des Mélanésiens dans les différents secteurs d'activités du Territoire et en particulier dans la fonction publique » (*La Dépêche Kanak*, 27 juin, 1988). Il a également ajouté que « l'éducation et la formation sont les clés du développement. Quel que soit le destin que la Nouvelle-Calédonie se choisira dans dix ans, ce territoire et ses différentes communautés ont besoin de responsables économiques, sociaux, culturels, administratifs compétents et ambitieux pour eux-mêmes comme pour leur pays » (Discours de Michel Rocard à Lifou, le 24 Août, 1988).

Tjibaou a fait des déclarations similaires, faisant appel aux Kanak « pour devenir mieux formés et éduqués afin de faire face à de plus grandes responsabilités ». À côté du Premier Ministre Rocard lors d'une visite au Territoire pour promouvoir les Accords de Matignon, Tjibaou a déclaré: « les gens doivent être mieux formés aux techniques de gestion, la gestion des coopératives, des magasins, et de se impliquer davantage dans l'économie de sorte que lorsque

vient le temps...de prendre la souveraineté de notre pays, nous avons entre nos mains les outils nécessaires» (Discours de J.-M. Tjibaou à Poindimié, le 26 Août, 1988). Derrière ces déclarations similaires se cachent différentes aspirations et attentes. Rocard espérait que la réforme éducative renforcerait l'influence française sur le territoire en intégrant plus efficacement les Kanak dans les structures politiques, économiques et socio-culturelles du territoire. L'objectif de Tjibaou était d'utiliser le soutien offert par la France pour amener le peuple kanak à une forme d'indépendance réaliste et durable.

5. La place des langues kanak et la crise de l'éducation kanak

Au cœur des objectifs éducatifs et culturels des Accords, on trouve la reconnaissance et la promotion des langues kanak. La place de celles-ci dans la société et dans le système d'éducation a longtemps été un point de discord. Il existe en Calédonie 28 langues kanak et onze dialectes différents ainsi qu'une langue créole. Les Kanak de différents groupes linguistiques utilisent uniquement le français pour la communication entre eux. Les premiers mouvements visant à permettre l'enseignement des langues kanak dans les écoles néo-calédoniennes n'ont pas eu lieu avant que les restrictions formelles de l'ère coloniale aient été levées. Des tentatives ont été entreprises par des organismes d'enseignement de l'Eglise protestante (1972) par l'Alliance Scolaire de l'Eglise Evangélique pour l'introduction de la langue Aie au Collège Nédivin à Haouilou. Selon Gasser (1979), cet effort a échoué parce qu'il n'y avait pas assez d'élèves intéressés ou d'enseignants formés. Quatre ans plus tard, son homologue catholique, (Direction de l'Enseignement Catholique), introduit l'Ajië dans un collège à Nouméa. En 1977, en réponse à la pression politique croissante, le Vice-Rectorat a créé la Commission des Langues Vernaculaires (Rivière, 1985). La participation de l'Etat avait encore progressé en 1979 dans le cadre du Plan Dijoud avec une formation dispensée en France par l'Institut National des Langues et Civilisations Orientales (INALCO) et la création en Nouvelle-Calédonie du Centre Territorial de Recherche et de Documentation Pédagogique (CTRDP).

Il a fallu attendre 1984 pour que l'interdiction de l'enseignement des langues kanak à l'école soit officiellement levée, par l'application d'une note du Ministre de l'Education, Alain Savary, datée de juin 1982 (Waheo et *al.* 1989). En 1981, le Vice-Recteur a estimé qu'il faudrait encore quatre ans pour introduire les langues kanak dans les lycées publics où elles seraient enseignées en vue des sujets de baccalauréats (Bruehl, 1981). En 1992, le Vice-Rectorat a finalement suivi l'exemple de certaines écoles secondaires privées et a introduit quatre langues kanak (Drehu, Nengone, Ajië et Paicî) dans les lycées de l'Etat, approuvées en tant que sujets « deuxième langue vivante » au niveau du baccalauréat.

L'Accord de Nouméa a fait une mention spéciale du rôle des langues kanak. Il y est dit qu'elles « sont, avec le français, des langues d'enseignement et de culture en Nouvelle-Calédonie. Leur place dans l'enseignement et les médias doit donc être accrue et faire l'objet d'une réflexion approfondie ». La France a signé la Charte européenne des langues régionales ou minoritaires qu'elle n'a d'ailleurs pas ratifiée, ayant signé 38 articles, considérant que celle-ci contenait des clauses anticonstitutionnelles et qu'il faudrait modifier la Constitution pour autoriser la ratification. N'importe comment, les langues kanak ont depuis 1999 été reconnues comme langues d'enseignement à tous les niveaux de scolarité. Ce qui est en soi une grande avancée, dans les textes du moins.

Dans la réalité, les langues kanak restent marginalisées et sous la menace de disparaître, avec treize d'entre elles officiellement reconnues justement en voie de disparition (Moseley, 2010). Une étude des élèves qui entrent au secondaire, a révélé qu'environ 70 % d'entre eux, ont déclaré le français comme leur langue maternelle alors qu'un tiers seulement d'entre eux avait un parent dont la langue maternelle était le français (cité dans Vernaudon, 2013). En raison de

l'urbanisation croissante et l'exposition à des médias de langue française en très grande majorité, les jeunes Kanak utilisent moins leurs langues kanak et leur aisance y diminue. Veyret et Gobber (2000) font remarquer qu'« on peut noter une progression de la langue française au détriment des autres langues, notamment dans le cadre familial, car la maîtrise du français est justement perçue comme associée à la réussite scolaire et donc sociale, et dans le mode de communication de la nouvelle génération, principalement urbaine » (cité en Fillol et Vernaudon, 2004 : 49).

Fillol et Vernaudon (2004) ont observé que, alors que les précédentes générations de jeunes kanak ont pu négocier deux espaces linguistiques distincts - la maison pour la langue maternelle, et l'école pour le français - cette distinction est en train de disparaître pour la génération actuelle. L'importance accordée au français comme seule langue pour l'avancement scolaire et social, conduit de nombreux parents kanak à se concentrer sur l'enseignement de leurs enfants en français au détriment de leur langue maternelle. Ils font valoir que cette menace pour les langues kanak, notamment en milieu urbain, est aggravée par l'impact d'une télévision presque exclusivement francophone et une pratique consistant à placer les enfants à l'école à un âge de plus en plus jeune. Comme Salaün et Vernaudon l'ont expliqué, « le statut de la langue française pour les Kanak, et particulièrement les jeunes, est ambigu : elle constitue à la fois la langue obligée, la langue véhiculaire, la langue d'intercommunication, la langue de l'école, la langue de la réussite, la langue officielle, la langue des Blancs, la langue du Colon, la langue des riches, une langue pour trouver un emploi, mais non la langue de leur culture, de leur quotidien, de leur identité. »

La France se place loin derrière d'autres pays pour la reconnaissance, l'intégration et l'utilisation des langues maternelles dans l'éducation. Un rapport PISA a signalé que cette approche française était exceptionnelle dans le contexte mondial. Il est précisé que « tous les pays sauf la France reconnaissent le soutien de la langue maternelle comme un élément important pour l'intégration et l'éducation. La plupart des pays offrent une combinaison de soutien dans la langue maternelle et la langue d'enseignement ». (Schleicher & Shewbridge, 2004: 49).

Parallèlement à ces tensions entre les langues française et kanak, il y a aussi des preuves d'un nombre croissant de jeunes kanak qui adoptent de plus en plus l'anglais. Le mouvement indépendantiste kanak a depuis longtemps reconnu l'importance politique et culturelle de l'apprentissage de l'anglais pour rompre l'isolement des kanak par rapport à leurs voisins du Pacifique (Ouneï, 1985). Mais là aussi et comme l'a montré l'étude récente de Bissoonauth et Parish (2017), ce sentiment se reflète désormais dans les attitudes et le comportement linguistique des jeunes kanak urbains qui valorisent et utilisent l'anglais parfois plus que les langues kanak traditionnelles, en raison des possibilités et ouvertures qu'il leur offre internationalement et surtout dans le Pacifique.

La France était en retard pour permettre au peuple Kanak de participer à l'éducation formelle, en retard pour adapter le système éducatif en Nouvelle-Calédonie aux besoins du peuple kanak, en retard pour reconnaître que les Kanak souffraient d'un échec éducatif sérieux, et en retard pour essayer de rectifier ce problème. Le plan stratégique actuel pour l'éducation en Nouvelle-Calédonie fait référence à la promotion des langues et à la culture kanak dans un projet scolaire qui aspire à être « adapté aux réalités du pays », agissant comme « le creuset du destin commun » et offrant à tous « les mêmes chances de réussite » (*l'École Calédonienne est en marche*, 2016).

Bien qu'il y ait actuellement une référence spécifique à la culture et la langue kanak, il n'y a jamais eu de reconnaissance officielle de l'ampleur de la crise de l'éducation de la population kanak. En 1971, Michel Senes, le directeur du seul lycée à Nouméa, a déclaré que « l'utilisation défectueuse de la langue française » était le principal obstacle à la réussite scolaire des Kanak,

tout en insistant que cette faille et d'autres problèmes étaient « aplanies » (Senes, 1971: 22). En 1981, le Vice-Rectorat a affirmé qu'il avait obtenu « des résultats spectaculaires » dans ce domaine et que les écarts de rendement entre les différents groupes ethniques ont montré « un léger décalage ». Il a en outre, exprimé sa confiance dans le fait que la poursuite de la stratégie existante comblerait cette lacune (Bruel, 1981). Un an après la signature des Accords, le Vice-Rectorat a affirmé de nouveau que «...l'enseignement secondaire a déjà amélioré ses résultats de manière significative. Il s'agit donc d'accentuer et de généraliser ces progrès, notamment dans les secteurs où ils étaient les moins sensibles ... » (Vice-Rectorat, 1989: 29). Cela montre que durant toute cette période, les responsables de la gestion de l'éducation publique du territoire, ont cru (ou fait semblant de croire ?) que des progrès appropriés avaient été réalisés.

Suite aux Accords de Matignon, le Vice-Rectorat annonça une importante initiative éducative pour aborder l'échec scolaire kanak. Le Programme d'Enrichissement Instrumental (PEI) serait introduit dans tous les collèges en Nouvelle-Calédonie, puis étendu dans les lycées. Comme tant de programmes d'apprentissage spécialisés, celui du PEI souscrit à la théorie de la privation culturelle – l'explication même de l'échec scolaire selon ce dernier – alors que son premier but était de « corriger les fonctions intellectuelles déficientes ». Approuvant totalement ce point de vue, le Vice-Rectorat a affirmé que « de nombreux élèves, considérés comme déficients ou en retard au vu de leurs productions, sont en fait des élèves qui ne peuvent affronter les tâches proposées par suite d'un manque de « modifiabilité cognitive », résultat, lui-même, d'un phénomène de privation culturelle. Cette situation est réversible et la modifiabilité cognitive peut être développée par l'apprentissage médiatisé. C'est le but du PEI » (Vice-Rectorat, 1992a: 21).

Après donc deux décennies de lutte kanak pour un changement éducatif important, l'agence principale chargée de l'éducation en Nouvelle-Calédonie et celle qui devrait donner effet aux engagements pris dans les Accords pour traiter l'échec scolaire kanak, se cramponne à la même théorie du déficit cognitif des élèves, qui a été articulée par Michel Senes vingt ans plus tôt ! Sans consulter les intervenants du milieu scolaire kanak, le Vice-Rectorat propose une solution psycho-techniciste à un problème profondément complexe qui a des dimensions historiques, sociales, culturelles et politiques. Il n'est donc pas surprenant que l'échec scolaire kanak perdure. La faute est imputée aux élèves et non à l'institution scolaire elle-même. Le couperet est tombé : s'ils échouent, s'ils sont en retard par rapport aux autres enfants de leur âge, la cause est dans leurs déficiences cognitives ! Cela rappelle de tristes conclusions pseudo « scientifiques » du XIX^e siècle, celles de l'eugénisme qui a largement justifié l'infériorisation et la domination de populations dans le monde colonial par leurs déficiences psychologiques congénitales.

Les statistiques officielles montrent que les taux d'échec pour les étudiants kanak sont restés significativement plus élevés que pour les élèves d'autres origines ethniques, en particulier les élèves européens. Au baccalauréat de 1981 à 1992, il y avait une légère réduction de l'écart entre les taux de réussite des kanak et des Européens. Cependant, avec les exclusions récurrentes des élèves kanak, nombreux sont ceux qui n'arrivaient à se présenter au baccalauréat. Malgré la persistance de l'échec scolaire des élèves kanak, le Vice-Rectorat se déclare satisfait de ces résultats, indiquant fièrement que les « les chiffres actuels confirment l'existence d'un nombre suffisant de lauréats de toutes ethnies - et notamment de bacheliers mélanésiens - pour accéder efficacement à l'ensemble des formations supérieures ... » (Vice-Rectorat, 1992b: 18)

Lors du « Forum du Pacifique Sud » en 1991, le Vice-Rectorat a présenté un document en anglais, décrivant le système éducatif du Territoire (Vice-Rectorat, 1991). Il comprenait un graphique qui présentait des données d'années sélectionnées pour montrer (incorrectement) une

augmentation continue du nombre des élèves kanak ayant réussi leur baccalauréat. Or, il y avait d'autres faits éducatifs importants qu'il n'a pas dévoilés. Une proportion beaucoup plus importante de Kanak n'a même pas réussi à passer le baccalauréat. Sans compter que la plus grande partie de l'augmentation du nombre de réussite de ces élèves, provenait de baccalauréats techniques et professionnels qui sont moins prestigieux. Le taux de réussite kanak au baccalauréat était plus bas en 1990 qu'en 1979, et l'écart entre les taux de réussite kanak et européen dans le baccalauréat est persistant.

En 1993, conformément aux politiques en France métropolitaine fondées sur des motifs complexes et controversés (Möschel 2009), il a été décidé de ne plus présenter les statistiques de l'éducation en Nouvelle-Calédonie par groupe ethnique. Il est donc devenu difficile d'obtenir des mesures précises de la persistance de l'échec scolaire kanak. Par exemple, nous ne pouvons plus comparer les taux de réussite au baccalauréat des élèves kanak et européens. Cela pose un problème dans un contexte de décolonisation au sein duquel l'accent a été mis sur la lutte contre l'échec scolaire kanak et l'inégalité des chances en matière d'éducation.

En l'absence de résultats fiables, il faudrait compter désormais sur des mesures indirectes moins fiables comme celles par exemple qui présentent approximativement des statistiques de l'éducation par Province. Sachant que la Province Nord et la Province Îles, sont majoritairement habitées par des Kanak et que la Province Sud est habitée principalement par une population non kanak. Certes cela donne une indication de la réussite scolaire comparée. Mais cela est contestable dans la mesure où le Sud comprend de nombreux Kanak urbains avec les caractéristiques particulières mentionnées ci-dessus, ainsi que la quasi-totalité de la population polynésienne importante du pays (de la Polynésie Française et Wallis et Futuna) qui elle, est confrontée à des problèmes de mauvais résultats scolaires.

D'autres statistiques citées dans une revue en 2012 sur les dimensions éducatives de vingt années de « rééquilibrage », ont révélé que l'écart de l'éducation n'a pas été comblé depuis les années 1990 (Hadj et al. 2012). La zone la plus remarquable où on a identifié de légères différences ethniques concernait les baccalauréats techniques et professionnels. Cela semble être le résultat du fait que les élèves kanak sont orientés vers ces branches dès leur sortie du collège. Bien que l'on puisse accepter le fait que le streaming puisse faire avancer les besoins de certains élèves, il limite également leurs possibilités de poursuivre des études supérieures, les Kanak restant sous-représentés ou parfois absents dans certains secteurs de l'emploi. Ce ne fut qu'en 2016, par exemple, que le premier avocat kanak a été admis au barreau (CDTM, 2016) dans un contexte où au moins 90% de la population carcérale de la Nouvelle-Calédonie est kanak (Anaya, 2011). Cette situation est au moins en partie similaire à celle des États-Unis classant la réussite scolaire selon les races.

Une autre façon d'estimer les comparaisons entre les résultats scolaires de différents groupes ethniques consiste à analyser les données du recensement. Cette méthode a été utilisée par Gorohoua et Ris (2017) qui ont puisé dans les résultats des recensements réalisés en Nouvelle-Calédonie en 1989, 1996, 2009 et 2014. Parmi les nombreux habitants qui vivent dans des zones rurales reculées, beaucoup continuent de se méfier de l'État pour des raisons diverses et certains groupes politiques importants ont demandé que les recensements soient boycottés. La fiabilité des données du recensement néo-calédonien est donc discutable.

Ajoutons à cela le manque de fiabilité aussi des données basées sur les individus qui déclarent eux-mêmes leurs diplômes sans qu'on ait à vérifier leurs déclarations. On ne peut s'empêcher de conclure que les comparaisons des performances éducatives basées sur les données du recensement sont beaucoup moins fiables que les statistiques recueillies directement auprès des établissements d'enseignement. Gorohoua et Ris prétendent montrer que « des progrès spectaculaires ont été accomplis dans le domaine de la réussite scolaire et que cette

amélioration est particulièrement marquée au sein de la population kanak ». Nonobstant les problèmes inhérents à l'utilisation des données du recensement, les preuves qu'ils présentent ne corroborent pas avec leur conclusion.

Le rapporteur spécial des Nations Unies a fait part de son inquiétude face à l'absence de ventilation ethnique des statistiques de l'éducation en Nouvelle-Calédonie. Il a noté les préoccupations de longue date à ce sujet, exprimées par l'Union des Groupements de Parents d'Élèves (UGPE) qui défend l'intérêt des élèves. L'une des dernières recommandations de son rapport était la suivante : « demander à l'État que des statistiques ethniques soient produites, notamment pour les élèves kanak, de manière à mesurer les progrès et mettre en place des mesures d'accompagnements efficaces à la réussite des élèves kanak. » (Anaya, 2011)

Conclusion

Le sujet que nous avons tenté de traiter de façon objective et non partisane, demanderait des livres entiers pour le circonscrire et le traiter en détails dans sa complexité. A des milliers de kilomètres de la terre française, dans un pays considéré par des colons comme un simple territoire conquis et exploité à leur avantage, vit depuis toujours une population indigène dite kanak qui y est discriminée à tous les niveaux et notamment sur le plan éducatif. Des indépendantistes ont ciblé dans leur lutte, l'éducation coloniale, l'accusant comme étant la cause essentielle du retard des Kanak quant au développement économique, social et autre. Pointée du doigt, l'éducation coloniale favorise en réalité la culture française et désavantage sinon ignore celle des indigènes. Devant l'exclusion de leur peuple du champ du savoir - clef de tout développement - les militants kanak ont combattu cette éducation à deux vitesses, l'une avançant vers le progrès et le bien être des colons et l'autre, reculant et faisant stagner les Kanak dans un état de misère physique et moral.

Les Accords prévoyaient d'améliorer les conditions éducatives, sociales et économiques des populations indigènes qui devaient désormais avoir accès aux mêmes droits que leurs concitoyens français. L'introduction des langues kanak dans le système éducatif était également prévue. Sauf que ce qui est écrit et signé par des partenaires dans ces dits Accords, est resté sur du papier et n'est pas toujours respecté sur le terrain.

L'échec scolaire des élèves kanak continue à faire de nombreuses victimes dans le système éducatif qui demeure malgré tout ségrégatif. Il n'est alors guère surprenant que les élèves kanak aient un niveau beaucoup plus bas que celui de leurs homologues européens. Malgré les déclarations officielles en faveur de l'amélioration de l'éducation kanak, sur le terrain, cela est resté un vœu pieux. Sans compter qu'à présent, les seuls mécanismes fiables permettant une évaluation objective, ont été supprimés.

Les discriminations scolaires qui induisent beaucoup d'autres par la suite, continuent donc à être subies par les Kanak qui ont été et restent une part importante des laissés pour compte de du système éducatif français. Durant des décennies de conformité forcée avec les politiques répressives du colonialisme, les Kanak ont adopté des actions de plus en plus militantes au cours des années 1970 et 1980, amenant finalement ceux qui détenaient le pouvoir à prendre leurs revendications au sérieux. La signature des Accords de Matignon a apporté la paix en Nouvelle-Calédonie, le mouvement indépendantiste ayant accepté de mettre un terme à la résistance militante. Tjibaou a réussi, au prix de sa vie, à convaincre la majorité des membres de ce mouvement de s'engager dans les Accords. Ils étaient conscients que c'était là un risque pour eux mais considéraient que leur signature en valait la peine.

Les Kanak savaient en effet que les concessions qu'ils avaient obtenues dans les Accords de Matignon et de Nouméa, ne garantissaient nullement que ce processus d'engagement se

traduise par le changement social durable et positif qu'ils cherchaient, et encore moins par l'atteinte de leur objectif qui est l'indépendance elle-même du pays. De nombreux militants actifs étaient opposés carrément à ces Accords même si des avancées y sont visibles pour les Kanak et qu'une haute priorité à l'éducation leur a été accordée.

Nous avons vu comment avec peu de moyens, ont été créées les Ecoles Populaires Kanak par le mouvement indépendantiste qui voulait à travers elles, contrer les objectifs de l'école coloniale et comment, pour diverses raisons, il s'est essoufflé. A y voir de très près, nous ne pouvons pas parler à proprement de son échec parce que son existence même de courte durée, a réalisé un changement dans l'esprit des Kanak qui veulent désormais aller de l'avant, prendre en charge leur destin, aspirant à transformer leur société dans le sens de leurs propres aspirations sociales, politiques, culturelles et économiques. N'est-ce pas là déjà une réussite en elle-même ?

Des questions fondamentales demeurent cependant posées quant à la nature du système éducatif, de ses inégalités, de ses curricula orientés, de sa généralisation aux enfants kanak, de son enseignement des langues kanak, de l'impact qu'il a actuellement et qu'il aura sur la réussite scolaire des élèves kanak et des effets à court ou à long terme sur l'avenir du peuple kanak dans son ensemble. Une véritable décolonisation ne peut être réalisée tant que ces questions fondamentales ne seront pas résolues. Rien n'est défini et déterminé d'avance. Tout se joue entre les hommes de bonne ou de mauvais foi avec les conséquences positives dans le premier cas et désastreuses dans le second.

Sans compter qu'après la signature des Accords de 1988, la société kanak, la Nouvelle-Calédonie, la France, le Pacifique et le reste du monde ont connu des changements notables sur tous les plans. Changements qui peuvent aussi influencer sur l'avenir des Calédoniens et de leurs rapports à la France, dans un sens ou d'un autre. À l'approche du Referendum de 2018, la question de l'indépendance reste dans tous les cas, centrale. Mais quid des post-réactions d'un « oui » massif ou d'un « non » majoritaire de ce vote tant attendu avec beaucoup d'appréhension et d'anxiété ? Il reste que le referendum prochain, sera crucial pour le destin des Kanak en particulier et pour celui des habitants de la Nouvelle Calédonie en général.

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Professionnalisation des enseignants et diversité des politiques d'éducation en Europe. Une recherche comparative Franco-Italienne.

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Dans cet article, Régis Malet et Monica Mincu envisagent la professionnalisation de l'enseignement comme analyseur des politiques, des dispositifs et des stratégies de la profession enseignante en Europe. Dans ce sens et à des degrés divers, la France et l'Italie illustrent un mouvement qui s'est engagé depuis quelques décennies dans bon nombre de systèmes éducatifs européens. L'analyse comparative proposée ici répond à quelques questions et enjeux essentiels de la formation, de l'école et des enseignants. Dans le cas du second degré par exemple, observe-t-on des problématiques partagées et des variations locales significatives en matière de préparation à l'exercice du métier et de développement professionnel ? *Quid* de l'autonomie professionnelle dans le travail des enseignants ? Quels sont les effets des politiques de professionnalisation sur la condition enseignante ? Les débats relatifs à ces enjeux permettent de situer les ressorts des politiques contemporaines en direction des enseignants et apportent un éclairage quant à la connaissance des logiques politiques et institutionnelles de valorisation du métier, de la condition enseignante et de la formation dans la perspective d'évolution à l'échelle européenne.

Mots-clés : Formation des enseignants – Politiques éducatives et de formation – France – Italie – Professionnalisation – Identité enseignante – Enseignement et apprentissage.

مهنة المعلمين وتنوع سياسات التعليم في أوروبا:

بحث فرنكو إيطالي مقارنة

في هذا المقال يوضح كل من ريجيس ماليت ومونيكا مينكو إضفاء الطابع المهني على التعليم كأداة لسياسات واستراتيجيات مهنة التدريس في أوروبا وبدرجات متفاوتة تقدم فرنسا وإيطاليا توضيحات للحركة التي حدثت خلال العقود القليلة الماضية في العديد من أنظمة التعليم الأوروبية. يتناول التحليل المقارن المعروض هنا بعض الأسئلة الأساسية وقضايا التدريب والمدرسة والمعلمين. في المستوى الثانوي الأعلى، على سبيل المثال، هل هناك مشاكل مشتركة وتغيرات محلية كبيرة من حيث التحضير للممارسة المهنية والتنمية؟ ماذا عن الاستقلالية المهنية في مهنة التدريس؟ ما هي آثار السياسات المهنية على شرط التدريس؟ تتيح النقاشات حول هذه القضايا تأطير السياسات المعاصرة للمدرسين وتسلط الضوء على معرفة المبررات السياسية والمؤسسية لتقييم مهنة التعليم، وشروط التدريس والتدريب على المستوى الأوروبي.

教师的职业化和欧洲教育政策的多样性：法国-意大利比较研究

雷格斯·马莱特和莫妮卡·敏促在本文中探讨了教学职业化的问题，并希望以此为欧洲的教师职业发展策略与政策提供建议。法国与意大利在很多方面可以说明欧洲在过去几个世纪中教育系统中发生的变革。在本文的比较分析中，作者论述了有关培训、学校、教师的关键问题。比如，在高中阶段，在专业实践和发展方面，是否有哪些共同面临的问题？或者是否有一些重大的地方性差异？教学中的专业自主权如何？有关职业化的政策对于教学环境和教学条件有哪些影响？围绕这些问题的讨论能够建构起分析当前教师政策问题的理论框架，并揭示出政治性和机构性的一些原理，显示出欧洲教师职业、教学环境和教师训练的价值。

Professionalization of teachers and diversity of education policies in Europe: A comparative Franco-Italian research

In this article, Régis Malet and Monica Mincu articulate the professionalization of teaching as an instrument for policies and strategies of the teaching profession in Europe. To various degrees, France and Italy offer illustrations of a movement that has taken place over the last few decades in many European education systems. The comparative analysis offered here addresses some key questions and issues of training, school and teachers. In the upper secondary level, for example, are there shared problems and significant local variations in terms of preparation for the professional practice and development? What about professional autonomy in the teaching profession? What are the effects of professionalization policies on the teaching condition? The debates around these issues enable the framing of contemporary policies for teachers and shed light on the knowledge of the political and institutional rationales for valuing the teaching profession, the teaching condition and training at the European level.

Профессионализация учителей и разнообразие образовательной политики в Европе: Сравнительное франко-итальянское исследование

В этой статье Режи Малэ и Моника Минку излагают профессиональную подготовку учителей как инструмент политики и стратегии педагогической профессии в Европе. В той или иной степени, во Франции и Италии есть примеры движения, которое имело место за последние несколько десятилетий во многих европейских системах образования. Сравнительный анализ, предлагаемый здесь, затрагивает некоторые ключевые вопросы и проблемы обучения, школы и учителей. Например, существуют ли на уровне старших классов средней школы общие проблемы и значительные местные различия в плане подготовки к профессиональной практике и развитию? Как насчет профессиональной самостоятельности в преподавательской профессии? Каковы последствия политики профессионализации для условий преподавания? Дебаты вокруг этих вопросов позволяют сформулировать современную политику для учителей и пролить свет на знание политических и институциональных обоснований для оценки педагогической профессии, условий преподавания и обучения на европейском уровне.

La profesionalización de los docentes y la diversidad de las políticas educativas en Europa: Una investigación comparativa Franco-Italiana.

En este artículo, Régis Malet y Monica Mincu articulan la profesionalización de la enseñanza como instrumento para las políticas y las estrategias de la profesión docente en Europa. En este sentido, Francia e Italia ilustran un movimiento que ha tenido lugar en las últimas décadas en muchos sistemas educativos europeos. El análisis comparativo ofrecido aquí, aborda algunas preguntas clave relacionadas con la capacitación, la escuela y los docentes. Por ejemplo, en el nivel medio superior, ¿existen problemas compartidos y variaciones locales significativas en términos de preparación para la práctica profesional y el desarrollo? ¿Qué ocurre con la autonomía profesional en la profesión docente? ¿Cuáles son los efectos de las políticas de profesionalización en las condiciones de enseñanza? Los debates alrededor de estos temas nos permiten enmarcar las políticas contemporáneas para los docentes y esclarecer los fundamentos políticos e institucionales para valorar la profesión docente, las condiciones de enseñanza y la formación a nivel europeo.

1. Introduction: Une comparaison intra-européenne des politiques de professionnalisation des enseignants

Le mouvement vers la professionnalisation de l'activité enseignante s'exprime, dans la plupart des contextes nationaux européens, sur fond de diversification et d'une complexification des tâches des enseignants. Devant composer avec des groupes d'élèves de plus en plus hétérogènes, les enseignants sont appelés à assumer des missions complexes, et se trouvent de plus en plus écartelés entre les cultures qui fondent et légitiment leur travail, et un appel à un élargissement de leur action, sur le plan individuel et collectif, qui peuvent ici et là perturber les normes professionnelles en usage dans tel ou tel contexte et brouillent leurs missions originaires (Malet 2008 ; Dupriez & Malet 2013 ; Tardif & Borges 2014 ; Wentzel, Lussi & Malet 2015). À des degrés divers, la France et l'Italie illustrent un mouvement qui s'est engagé depuis quelques décennies dans bon nombre de systèmes éducatifs en Europe. On y assiste à un phénomène de renforcement des exigences en matière de formation et d'exercice du métier d'enseignant, faisant ressortir un nouvel enjeu pour les politiques d'éducation, celui de la « qualité » de l'enseignement. Les évolutions des conditions d'exercice des enseignants dans ces deux pays conduisent à examiner la question de la professionnalisation dans le contexte plus large des conditions de formation et d'exercice des enseignants à l'échelle européenne.

Désormais, les décideurs politiques tendent à conférer à la professionnalisation des enseignants et à la qualité de l'enseignement, une fonction décisive d'entraînement de la réforme (Commission Européenne. 2007) et de la réussite même des élèves (Darling-Hammond 2000, Little & Goe 2009), les enseignants étant en quelque sorte identifiés comme la colonne vertébrale des systèmes éducatifs. Au risque de faire peser sur eux une responsabilité écrasante (Pandey 2010), qui s'exprime à travers la mise en oeuvre dans de nombreux systèmes d'enseignement de politiques de reddition de comptes (Dupriez & Mons 2011, Dupriez & Malet 2013, Dutercq & Maroy 2014, Malet 2016). L'examen des politiques en direction du monde enseignant menées dans les différents contextes nationaux permettent ainsi de saisir l'intensification et la complexification du travail des enseignants.

L'entrée de l'école dans un espace éducatif concurrentiel, combinée à une demande sociale de plus en plus pressante adressée à l'école par ses usagers, un recours croissant aux évaluations nationales et internationales, la promotion d'une organisation scolaire rapprochée de son environnement socioéconomique et soumise en retour à des injonctions de responsabilisation et d'évaluabilité de ses performances : autant de bouleversements pour l'école et la profession enseignante, dans leurs modes d'organisation et de régulation. C'est particulièrement vrai dans des contextes nationaux – comme la France et l'Italie – marqués par une tradition éducative de type encyclopédique fondée sur le rationalisme (McLean 1990), moins spontanément préoccupée de l'utilité pratique des savoirs que par la transmission des savoirs disciplinaires et de la culture. En France et en Italie, où ces évolutions prennent des formes spécifiques et plus ou moins brutales, c'est dans un contexte de fragmentation croissante de la profession, tant sur le plan des conditions d'exercice que d'identification collective, que s'expriment ces évolutions.

À ces évolutions, les pouvoirs publics répondent par des réformes de la formation, de l'accès au métier et de son évaluation : exigences de qualité renforcées en Suède, élargissement des viviers de recrutement dans le cas de l'Angleterre, dispositifs probatoires aux Etats-Unis, promotion d'une culture de la responsabilisation en Italie, renforcement des prescriptions intermédiaires et promotion du travail collectif en France et des vertus en termes de formation, de socialisation et de développement de compétences professionnelles – de travail coopératif, de collégialité – jugées décisives pour la réussite éducative.

La professionnalisation est abordée dans ce texte comme « analyseur » des politiques, dispositifs et stratégies en direction de la profession enseignante, plutôt que comme véhicule international de normes universelles. Observe-t-on des problématiques partagées et des variations locales significatives en matière de préparation à l'exercice du métier et de développement professionnel ? *Quid*, dans le contexte international, de l'autonomie professionnelle dans le travail des enseignants ?

Le niveau d'enseignement privilégié est ici celui de l'enseignement secondaire en France et en Italie pour deux raisons : d'une part, les données de recherche, lorsqu'elles existent, se situent surtout à ce niveau et, d'autre part, la démarche comparative invite à une compréhension contrastée des enjeux compte tenu de la complexité des contextes institutionnels observés, qui sont particulièrement fortes à l'intérieur de chaque pays dans le second degré.

Le choix d'une perspective européenne pour aborder la question des politiques de professionnalisation est une option ferme. Il s'agit de saisir dans une perspective plus large que ne le permet une perspective française ou francophone, l'évolution et les débats relatifs à ces enjeux de professionnalisation, afin de situer les ressorts des politiques contemporaines en direction des enseignants, leur condition, leur formation et leur professionnalisation dans la perspective d'évolutions à l'échelle mondiale.

L'objectif est de dessiner certains enjeux propres à l'évolution du paradigme de la professionnalisation, dans l'espace européen, dont la perception est souvent idéologisée ou opacifiée par les débats proprement nationaux.

2. L'université et la professionnalisation de l'enseignement : une solidarité sous régime probatoire

Au cours de ces dernières décennies, on observe un rôle croissant des universités, ou des institutions rattachées, comme en France, dans la formation initiale et continue des enseignants. Il s'agit d'un élément saillant des évolutions de la formation des enseignants en Europe, où « l'universitarisation » a constitué une volonté politique forte d'élévation du niveau de recrutement des enseignants, de mise en parité des enseignants du premier et du second degré. C'est beaucoup moins le cas dans d'autres aires géographiques, comme l'Amérique du Sud ou l'Amérique du Nord où, aux Etats-Unis particulièrement, on a observé au contraire un recul de la part prise par les universités dans la formation (Malet, 2009, 2016).

Ce mouvement « d'universitarisation », qui est intervenu assez tardivement en France comme en Italie si l'on compare avec d'autres pays européens, tend à renouveler la problématique de l'alternance et de l'articulation entre formation académique et professionnelle, en travaillant à la création dans certains contextes de nouveaux équilibres entre les terrains et les acteurs de la formation universitaire et professionnelle. La responsabilisation de l'université quant à l'ensemble du curriculum de formation, dans un contexte d'évolution de ses missions de prise en compte plus forte des enjeux de professionnalisation, favorise de nouvelles dynamiques. Les cycles d'étude, pourraient en outre se rapprocher progressivement de la formation des enseignants du primaire et du secondaire. C'est le cas en Europe dans plusieurs pays des Balkans (Albanie, Bosnie, Montenegro, Croatie, Serbie), en Suède, au Québec (Canada) avec la suppression des écoles normales, en Angleterre, en France bien sûr avec la création des Écoles supérieures du professorat et de l'éducation (Commission Européenne 2013).

L'affirmation d'une visée de professionnalisation dans le cadre d'une responsabilisation renforcée des universités amène à penser à l'articulation des partenariats entre l'université et le terrain professionnel, dans le cadre de l'organisation de l'alternance, très fortement appelée à être renforcée par les organisations internationales. Toujours au niveau européen, outre la

promotion de compétences d'adaptation à l'hétérogénéité des groupes d'élèves, de soutien aux enfants aux besoins spécifiques, la maîtrise de l'enseignement avec les nouvelles technologies TICE et les compétences professionnelles de gestion des comportements et d'administration constituent désormais des domaines de compétences spécifiques qui ont été introduites par l'Union Européenne (UE) comme des objectifs des futurs enseignants des premier et second degrés..

De façon générale, même si les priorités sont variables selon les pays en matière d'éducation scolaire, on peut observer que les finalités convergent autour de la transmission de connaissances et de compétences, de la socialisation, de la préparation à la vie sociale et professionnelle (*Journal officiel de l'Union européenne*, 2010). Sur le plan de la prise en charge de ces priorités définies au niveau européen, on observera des différences en France et en Italie.

L'agenda des politiques en direction des enseignants varie selon les pays et aussi selon le degré de centralisme du système. Ainsi, dans les systèmes centralisés, on assiste progressivement à une remise en cause d'une gestion monopolistique de l'éducation par l'État et de promotion de formes déconcentrées et rapprochées des contextes locaux, soutenues en cela par des agences indépendantes de l'État - le cas de l'Italie est très emblématique sur ce plan, comme nous allons le voir.

Les effets combinés de ce tournant entraînent un mouvement de dévolution de la responsabilité de l'implémentation des politiques éducatives au niveau local, couplé avec une centralisation forte de politiques éducatives articulant impulsion (*input*), responsabilisation et contrôle (*output*). Le mouvement a été soutenu par un renforcement des évaluations à tous les niveaux des systèmes scolaires, l'établissement scolaire constituant le cadre privilégié de cette évaluation (Rizvi et Lingard 2010).

3. Au-delà des modèles hérités, des formes de régulation de l'enseignement contrastées en France et en Italie

Les systèmes éducatifs français et italien sont fortement centralisés sur le plan des contenus et des recrutements, mais contrairement au modèle français, le système italien se caractérise par l'absence d'un organe étatique d'évaluation des enseignants, autrement dit d'inspection.

Cela produit une complète autonomie *de facto* de la profession enseignante. Liée avec une culture professionnelle marquée par l'individualisme, cette tradition politico-administrative très centralisatrice se combine désormais avec une « diversification interne » du système (Semeraro 1998 : 221), consécutive d'une dérèglementation partielle qui a été amorcée dans les années 90 et intensifiée avec la réforme dite d'autonomie scolaire lancée en 1997.

Depuis 2001, l'Italie est entrée dans une nouvelle phase de fédéralisation de l'éducation, qui s'exprime notamment par une décentralisation financière et institutionnelle sur le plan régional (Bordignon & Fontana 2010). Cette tendance vers la dérégulation se distingue du modèle déconcentré français (Mons 2008). La déconcentration, qui constitue un aménagement technique de la centralisation, ne confère en effet en France aux acteurs académiques locaux qu'une mission de mise en œuvre des préconisations ministérielles, émises donc au niveau central. En outre, la figure des inspecteurs continue à assurer en théorie au système son caractère indivisible et unificateur. Il en va tout autrement en Italie, où la dérégulation est allée de pair avec le démantèlement d'une des institutions majeures de l'État-providence, le « collège d'enseignement général inférieur » (équivalent du collège unique français), composante-clé du système d'enseignement secondaire (Mincu 2015).

La réforme d'autonomie scolaire a encore renforcé la capacité d'initiative des enseignants dans la définition des contenus et des formes d'enseignement, avec un accent renouvelé autour du

paradigme des compétences, par opposition à un accent sur les contenus disciplinaires. Cette liberté pédagogique des enseignants est commune avec les enseignants français, mais les derniers sont soumis à des exigences de conformité et de respect des curricula par le biais des inspections.

Le contexte de dérégulation en Italie a conduit en revanche à des effets majeurs sur la profession enseignante favorisant des dispositifs de régulation non par la vérification de la conformité des pratiques, mais par des performances éducatives. Jusqu'à cette réforme, les professeurs n'étaient traditionnellement responsables ni auprès des pairs par un quelconque mécanisme de régulation locale, ni auprès de leurs chefs d'établissement. Ils évoluaient donc en l'absence de tout contrôle interne ou externe. Une indexation très forte des pratiques pédagogiques aux normes véhiculées par les manuels scolaires constituait le seul obstacle à leur autonomie complète. L'évaluation restait formelle dans sa nature : l'introduction d'indications pour le programme d'études national fondé sur des cibles d'apprentissage très générales, faiblement standardisées, avec une absence totale de mécanismes de contrôle pour vérifier de quelles manières les curricula sont mis en œuvre dans les écoles. Formellement centralisé mais souffrant d'un déficit d'outils de régulation interne et de formation continue des personnels, le système éducatif italien se signale par une forte externalisation des processus d'évaluation.

La construction d'outils internes de régulation des carrières et de la formation des enseignants permet d'accomplir une authentique autonomie professionnelle, comme il a été par exemple observé en Finlande ou dans la province de l'Ontario au Canada (Malet, 2016), ou en France pour la réforme des ESPE qui tend à le promouvoir depuis 2013 par un renforcement des liens entre l'Etat-employeur (représenté localement par les Rectorats d'Académie), l'Etat-formateur (les universités dans lesquelles se situent les ESPE) et enfin les établissements scolaires (lieux d'exercice mais aussi de plus en plus, lieux de formation professionnelle).

En Italie, le déficit d'étayage tant sur le plan de l'exercice professionnel que de la formation continue conduit à une fragmentation interne de la profession et semble alimenter l'individualisme dans les conditions d'exercice professionnel (Mincu 2015).

C'est dans ce contexte que de nouvelles formes de gouvernance et de régulation des pratiques enseignantes se sont développées depuis quelques années en Italie. Le premier de ces outils est un système d'évaluation national, créé en 2011 et censé aider des écoles dans l'amélioration de leurs performances, planifier des actions pour des écoles en difficulté, favoriser la transparence et la responsabilité sociale et évaluer des chefs d'établissement dans leur propre efficacité professionnelle. Conçu sur le modèle anglais, le dispositif INVALSI (Istituto nazionale per valutazione del sistema educativo Di istruzione e Di formazione) a présenté en 2013 le premier test d'élèves standardisé au niveau national, enrichi d'un outil d'auto-évaluation et d'audit des établissements scolaires dans l'accompagnement du changement.

Les mots-clés de ces évolutions sont la professionnalisation, le développement professionnel des enseignants, la fonction apprenante des établissements et la conduite du changement dans les écoles.

En France comme en Italie, on sait que l'identité des enseignants du second degré, n'est pas héritière des mêmes traditions pédagogiques et de formation que celles des enseignants du primaire. Les premiers sont traditionnellement issus de l'université, enseignant en France une seule discipline (au contraire de leurs homologues italiens qui en enseignent souvent deux ou plus), leur identité est liée aux savoirs acquis au cours de leurs études universitaires avant qu'ils passent un concours préalable à la formation professionnelle proprement dite.

Le poids de l'Inspection Générale, la survivance des influentes associations de spécialistes, défenseurs de l'intégrité et du poids de leur discipline dans les programmes d'enseignement, attestent de cette vitalité pérenne en France des identités disciplinaires dans le second degré. De fait, les modèles pédagogiques promus par cette culture du secondaire sont marqués par cet ancrage universitaire et disciplinaire. La création des Instituts Universitaires de Formation des Maîtres (IUFM) fut l'aboutissement d'un projet de professionnalisation de la formation des enseignants et d'harmonisation des statuts des professeurs, en réponse à la fois à une volonté politique et à des urgences conjoncturelles.

Avec les IUFM puis les ESPE en France, l'importance accordée aux savoirs de recherche est plus manifeste qu'en Italie. Ces derniers sont associés à une confrontation croissante avec les savoirs issus de la pratique enseignante. C'est moins, comme c'est le cas en Italie, la rupture que la continuité qui caractérise le modèle français, avec un affermissement des ESPE quant au statut proprement universitaire de la formation des enseignants. La réforme des ESPE a ainsi signé un renforcement des liens entre l'université et la formation des enseignants.

4. De l'État-évaluateur à une professionnalisation exogène : du laisser-faire à la standardisation

En France comme en Italie, où la rencontre entre la fonction enseignante et l'imaginaire professionnel ne va pas de soi (Malet 2008, 2016 ; Mincu 2015), la notion de professionnalisation a été et demeure souvent envisagée principalement en référence à des enjeux proprement individuels, d'ordre praxéologique et cognitif. Elle est très orientée vers une adaptation et une amélioration de l'expertise professionnelle des enseignants et de leur meilleure efficacité par leur mobilisation subjective (Malet 2005 ; Tardif 2007).

Il y a là matière à interroger comme le fait Champy (2009) en référence aux critiques de la diffusion en Europe de la rhétorique de la professionnalisation : « ce qui est reproché, c'est l'importation en Europe, dans un contexte historique différent de celui des États-Unis, d'une notion inadaptée à l'étude des sociétés européennes » (p. 30). Une telle importation de l'imaginaire professionnel enseignant, cantonné à sa dimension praxéologique et consensualiste dans son expression, expose singulièrement la profession, dans un contexte de renforcement d'une hiérarchie professionnelle de proximité, à ce que Demailly (2009) a reconnu par la formule paradoxale de « professionnalité managérialisée ». Ce mouvement fut également thématiquement par Preston, au sujet de l'Australie, puis par extension pour les pays anglo-saxons (*managerial professionalism vs democratic professionalism* : Preston 1996), ainsi que par Hargreaves (2000), qui distingua le « professionnalisme classique » d'un « professionnalisme flexible ». Il est très caractéristique de ce qui se joue dans les politiques contemporaines en direction des enseignants en Italie, notamment.

Sur ce même plan, Lang (1999), tout comme Cattonar et Maroy (2000), a observé une forme d'instrumentation de l'idée professionnelle à l'œuvre dans les politiques de professionnalisation développées en France ou en Belgique depuis les années 90, la professionnalisation étant mise au service d'une modernisation de l'école, d'une déconcentration de la régulation de l'école, d'une autonomisation contrôlée d'écoles devenues « organisations apprenantes », et enfin, bien entendu, d'une imputabilité des établissements et des personnels au regard des résultats de leur établissement.

La professionnalisation des enseignants opère en somme dans l'espace francophone comme un horizon d'attente idéalisé, dans un univers scolaire dans lequel le travail se complexifie et se fragmente, malgré un cadre qui demeure théoriquement unitaire.

Ces repères conceptuels sont utiles pour comprendre comment le scénario italien des réformes en direction des enseignants se déploie. Une dimension clé du professionnalisme, selon Hoyle (1982 : 146) est de considérer que le professionnalisme sert à « favoriser l'amélioration de la qualité de service ». En tant que tel, le professionnalisme est intrinsèquement lié à une idée d'amélioration ou de qualité dans l'enseignement et de l'éducation en général.

De plus, il existe une distinction utile entre le professionnalisme extérieurement défini et prescrit et le professionnalisme endogène et actif (Evans 2008). Le professionnalisme extérieurement conduit, est un concept qui peut être fructueusement appliqué pour examiner comment dans un contexte de politique renouvelé, prend forme l'idée de ce qu'un professeur italien professionnel peut être.

Ceci exige l'analyse de certains des acteurs majeurs, comme le gouvernement, ou les processus de réforme qui peut exercer l'influence externe sur le profil de la profession enseignante. De plus, l'examen d'autres contextes, comme l'Angleterre, peut éclairer les interprétations différentes de professionnalisme.

Dans la continuité de ce qu'ont illustré d'autres travaux (Mincu & Chiosso 2009), le contexte italien a été marqué par une forte fragmentation professionnelle, tant sur le plan des pratiques que des modalités d'accès à la profession. Le mouvement de responsabilisation, entendu comme imputabilité individuelle et collective des établissements devient le maître-mot d'une réforme qui tend à promouvoir une conception exogène, prescriptive et standardisée de l'expertise professionnelle.

5. Importations politiques et imputabilité professionnelle des enseignants italiens

En Italie, le processus « d'universitarisation » et de professionnalisation fut également tardif, comparé à d'autres pays. Comme la France l'a fait dès le sortir de la Seconde Guerre Mondiale avec le Plan Langevin Wallon en 1946, le débat parlementaire avait déjà été amorcé dès 1962, mais le processus ne s'est tout à fait accompli que près de quatre décennies plus tard, à la fin des années 90. Cette réforme a même été retardée pour plus de cent ans selon Luzzatti (2000 : 15). Jusqu'à 1998 en effet, le modèle duel École Normale (Scuole Magistrali ou Istituti Magistrali) pour les enseignants du primaire coexistait avec un modèle purement disciplinaire pour les enseignants du secondaire, pour lesquelles une formation professionnelle spécifique n'a été introduite que tardivement, en 2008.

La création d'un Système d'Évaluation national autour de l'agence INVALSI (Istituto nazionale per la valutazione del sistema educativo di istruzione e di formazione), était l'élément moteur pour une nouvelle direction visant à améliorer les performances du système éducatif italien. Promouvant une logique de responsabilisation et d'imputabilité qui n'était pas contenue dans le mandat confié aux enseignants, les syndicats de la profession ont initialement exprimé de la critique et de la résistance à l'introduction de tests standardisés à plusieurs étapes et plus récemment à la différenciation des personnels par un mécanisme de paye basé sur la performance.

L'agence INVALSI a contribué à la diffusion d'une évaluation standardisée au niveau national (Sistema Nazionale Di Valutazione) à la transparence et l'imputabilité des chefs d'établissement dans les performances de leurs écoles. Conçu sur le modèle anglais, le dispositif INVALSI a présenté en 2013 le premier test d'élèves standardisé au niveau national, enrichi d'un outil d'auto-évaluation et d'audit des établissements scolaires dans l'accompagnement du changement (Eurydice, 2016). Toutes les écoles sont invitées à produire un rapport d'auto-évaluation et un plan d'amélioration scolaire, aussi bien qu'à mesurer et évaluer la performance globale de l'administration elle-même, avec des systèmes élaborés de

récompense pour les meilleurs établissements (Loi 150/2008). La Loi dite « Une école de qualité » a lié l'évaluation de professeur sur la performance, aux effets sur sa rémunération. L'évaluation selon la « Loi dite « Une école de qualité » a conditionné la rémunération des professeurs à leur degré de performance. Le chef d'établissement évalue les professeurs et peut désormais les gratifier selon des critères émis par chaque école selon des indicateurs adaptés à chaque établissement.

Cela promeut l'idée d'un professionnalisme fragmenté et externalisé qui place le développement de collectifs de travail performants au cœur du propos. Si ces éléments de langage se déclinent dans bien des espaces nationaux, la France se caractérise par le ménagement d'une liberté pédagogique forte des enseignants, qui ne sont pas individuellement soumis à des exigences de performance, mais évalués selon le modèle classique républicain de la vérification de la conformité des pratiques professionnelles avec les instructions officielles.

En l'absence de corps d'inspection, la profession enseignante italienne est soumise à un tournant brutal. On sait que la convergence des systèmes est sans doute plus manifeste dans l'examen de l'évolution des épreuves endogènes et de la situation morale des enseignants que dans les modèles de formation au métier (Hargreaves 2003 ; Malet 2009). Si par sa nature, discrétionnaire et cellulaire (Lessard et Tardif 2004 : 57), leur travail est marqué par l'autonomie, à une logique de mandat fait de plus en plus place une logique de contrat et d'objectifs ; dans certains pays plus que d'autres, à une logique de responsabilité fait place une logique d'imputabilité (Dupriez & Dumay 2009 ; Dupriez & Mons 2011). C'est le cas désormais pour l'Italie, par la mise en œuvre en deux temps des outils de transformation exogène de la profession :

(1) mise en place des outils d'évaluation et de conduite du changement ;

(2) responsabilisation des personnels et des collectifs de travail par le biais notamment d'un renforcement du pouvoir de promotion/sanction des personnels d'encadrement.

Dans la définition même des attributs des enseignants, les textes ont dessiné de nombreuses compétences attendues des enseignants italiens, en lien avec la rhétorique du développement professionnel qui apparaît encore timidement dans la définition statutaire des enseignants français, pour lesquels sont préférées les notions d'interdisciplinarité, les missions de concertation, d'orientation, et en plus de celle d'enseignement. *A contrario*, en Italie, la mobilisation située des concepts de professionnalisation et de responsabilisation individuelle et collective s'accroît : la formation continue s'inscrit désormais comme « un environnement professionnel formateur continu » (MIUR 2016, p. 5) qui doit être corrélé avec une formation initiale rapprochée des terrains professionnels.

La question du développement professionnel doit être fondée sur une connaissance approfondie de l'école, de ses besoins spécifiques et nourrie par des actions appropriées, concertées et évaluées par les équipes enseignantes. Les enseignants sont invités à renseigner un bulletin individuel d'auto-évaluation permettant de planifier et d'enregistrer les actions menées dans le sens d'une meilleure efficacité professionnelle.

Le développement de telles compétences a été documenté dans un « portefeuille numérique personnel » qui devient aussi un outil-clé pour l'évolution des carrières. L'enjeu est de lier étroitement le développement professionnel avec des pratiques éducatives situées, selon un modèle de développement professionnel articulant professionnalisation individuelle et collectifs de travail, très inspiré du monde anglo-saxon (Fullan in Mincu, 2012).

6. Discussion

6.1. Formes locales de régulation de la profession enseignante et portée des politiques en direction de la profession enseignante

Dans la conception héritée de la sociologie des professions, la professionnalisation d'une activité s'exprime à travers plusieurs dimensions : le professionnel est celui qui exerce une activité socialement utile et reconnue, qui a bénéficié d'une formation longue de niveau supérieur, qui s'appuie sur des savoirs scientifiques reconnus comme efficaces, savoirs légitimés par le groupe professionnel qui se charge de les promouvoir et de les transmettre aux nouveaux membres de la profession. Le professionnel, fort de ces savoirs experts reconnus jouit en conséquence d'une autonomie et d'une reconnaissance sociale liée à un haut degré de responsabilité par rapport à son activité.

Appliquée à l'activité enseignante, cette conception classique peut ou a pu présenter une certaine pertinence dans certains contextes nationaux, comme quête, comme horizon ou comme modèle, et peut-être moins dans d'autres, comme la France par exemple, où la logique de service public et la forme scolaire même ne paraissent pas d'emblée solubles dans cet imaginaire professionnel. (Malet, (2008, 2015). Lussi Borer (2014) et Stumpf (2015) observent les tensions récurrentes dans l'implémentation des politiques de formation des enseignants ; des tensions fortes entre *objectifs* s'inscrivant en discours et en principe dans une culture de la professionnalisation et des dispositifs qui restent ancrés avant tout dans une culture scolaire et enseignante.

En France, cette tension est particulièrement forte, notamment pour les enseignants du second degré, du fait des modalités de recrutement national du personnel enseignant, sur des bases qui demeurent essentiellement académiques et disciplinaires et qui sont largement déconnectées des préoccupations de professionnalisation affichées.

En Italie, en l'absence de régulation de la profession par de corps d'inspection, comme c'est le cas en France, l'exposition à une régulation exogène de la profession par l'évaluation est réelle, sans que la dimension centralisatrice fondatrice du système italien soit remise en cause. La décentralisation a été décrite comme une délégation du pouvoir du centre vers la périphérie. Ses promoteurs plaident pour une gestion rapprochée des problèmes scolaires et le renforcement des prérogatives des acteurs locaux sur ce qui les touche (*roll back the State*), le processus étant accompagné d'une autonomie des échelons intermédiaires, des établissements et de leurs personnels (Little, 2001).

Ainsi, plus que la promotion de politiques du laisser-faire ou d'un désengagement de l'État central, dans des pays de tradition centralisatrice comme la France et l'Italie, on observe dans les politiques contemporaines en direction l'école et des enseignants la promotion d'un modèle de régulation post-bureaucratique qui tend plutôt au renforcement du contrôle de l'État dans la régulation des systèmes d'enseignement et de formation (*top-down policies*) (Apple 2004, Ball 2003, Broadfoot 2000, Whitty 2000). Doray *et. al.* (2014) et Malet (2008) ont montré que les politiques d'inspiration libérale menées depuis deux décennies ne signalent pas un effacement de l'État dans la guidance des politiques éducatives mais à un repositionnement qui s'accompagne du développement et de la mobilisation d'instruments de contrôle et de pilotage de l'action publique empruntés à la nouvelle gestion publique (NMP). On a observé ce phénomène en Angleterre et en Suède, mais aussi en Amérique du Nord, au Canada, et au Québec en particulier, aux États-Unis, malgré la subsidiarité des États fédérés (Malet 2009, 2012), en Amérique du Sud (Brésil, Chili et Argentine) (Roger & Desbiens, 2014), ou encore dans certains pays des Balkans (Commission Européenne, 2013).

6.2. L'Europe, la profession enseignante et la promotion de l'organisation apprenante : considérations critiques

Même si l'OCDE (2013) souligne cette volonté internationale d'inscrire la professionnalisation des enseignants dans une perspective intégrative entre le professionnel et l'académique, entre la théorie et la pratique, entre l'université et l'école, et de faire de l'espace scolaire ce lieu de mobilisation des ressources individuelles et collectives de formation en cours d'emploi, c'est encore en Europe que ce principe partagé par l'ensemble des pays industrialisés paraît le plus ferme sur le plan de la volonté politique qui le porte.

Ainsi, le mouvement « d'universitarisation » de la formation qu'a connu l'ensemble des pays européens depuis vingt ans, le rôle organisateur qui a été confié à l'université – y compris en France avec la création des ESPE – et le développement conjoint de l'alternance (Ciavaldini-Cartaut, 2009), sont l'indicateur d'une appropriation très distinctive de ce paradigme.

Les liens sont étroits dans les textes et les préconisations des décideurs politiques européens et nationaux, entre évaluation des enseignants et développement professionnel des enseignants (Wentzel 2014), mobilisant et diffusant un lexique qui dessine une nouvelle image de l'enseignant-professionnel et donc de nouvelles politiques de professionnalisation, qui se veulent mobilisatrices des individus et des collectifs : autoévaluation, évaluation par les pairs, autoréflexion, contrats de performances, analyse des besoins, audit, enquêtes collaboratives (Commission Européenne 2007, 2009, 2012).

De même, spécificité des politiques de professionnalisation européennes en la matière, « l'universitarisation » de la formation des enseignants s'accompagne d'une valorisation conjointe de l'expertise, de la responsabilité et de l'autonomie professionnelles des enseignants, d'une part, et de la recherche, identifié comme moyen privilégié de formation tout au long de la vie, d'autre part : « There is a significant scope for the teaching professions to play a more active role in matters such as defining professional standards and deontology and promoting research about teaching and learning » (Commission européenne 2012, p. 40).

Cette double préconisation, qui signale une construction idéale d'une conception européenne de la professionnalité enseignante, fondée à la fois sur la réflexivité critique et la formation de praticiens-chercheurs tout au long de leur carrière, s'étend de plus en plus aux formateurs d'enseignants : « Teacher educators should be involved both in theory and in practice, in dialogue between teaching and research, and maintain a good balance of all these aspects » (Commission européenne 2012 : 59).

L'acceptation de ces conceptions du développement professionnel et des communautés de pratiques, qui mobilisent les réseaux, les lieux d'échange, d'analyse des pratiques et de capitalisation des expériences, sont expansives et extensives, comme le note Stoll (2006 : 6) : « professional learning communities are groups of teachers or school leaders, or even whole schools or groups of schools- also known as learning networks or networked learning communities. This interpretation is inclusive and expansive. It allows for wide participation and varied involvement ».

La promotion et l'évaluation des établissements scolaires et des collectifs professionnels ont été fortement soutenues dans beaucoup de pays anglo-saxons par des formes d'administration sociale tirant les enseignements du *site-based management*. La division des tâches d'encadrement est un des instruments privilégiés de ces politiques. Ces procédures d'éclatement de l'autorité et de segmentation de la profession constituent des facteurs facilitant la promotion d'un professionnalisme managérial, ou « nouveau professionnalisme » (Malet 2009), en référence aux cas anglais et étatsunien), et explicatifs du changement endogène de la profession en cours dans beaucoup de pays anglo-saxons (Grande-Bretagne, Australie,

Nouvelle Zélande, Canada anglophone et francophone... - *institutional devolution* – Ball, (2003), Moreau (2013).

Si ces conceptions lourdes des dispositifs de reddition de comptes se développent moins en Europe qu'en Amériques, l'exemple italien témoigne de ce qu'elles pénètrent l'espace européen, dès lors que les contextes locaux le permettent. Or, si certaines recherches soulignent la plus-value de certains dispositifs combinant *accountability* et développement de communautés de pratiques (Robinson, 2011), un certain nombre d'autres recherches dénonce les dommages produits par ces évolutions sur l'autonomie professionnelle d'enseignants réduits aux rôles d'exécutants et sur le climat d'établissements scolaires devenus le théâtre d'ambitions individuelles peu compatibles avec une légitimité sociale conquise sur l'affirmation d'une éthique et d'un jugement professionnels intégrant une conception collégiale de l'activité (Ball, 2003), (Osborn 2005). S'adosse au renforcement d'une culture fédérative, un ethos rassemblant des individus visant la réussite de leur établissement (*performance-driven culture / market-driven professionalism*) (Jenkins & Conley 2007).

Pour certains chercheurs, la promotion iconique des collectifs professionnels d'établissement affecte la profession enseignante : son cadre, sa nature et les relations qui l'organisent (Smyth *et al.*, 2000) notamment par l'extension des tâches des enseignants – combinant administration, animation, concertation, promotion, conception, transmission, justification –, échafaudage de rôles culminant à un « haut niveau de stress et d'épuisement (*burnout stemming*) du fait de la charge de travail (*workload*) » (Oplatka & *al.* 2002 : 32). Cette responsabilisation croissante d'enseignants, voués à servir la réussite et l'efficacité de leur établissement (*target-driven culture*) figure, avec la charge de travail (*workload*), parmi les raisons les plus invoquées concernant les phénomènes de *burnout* et d'abandon des enseignants aux États-Unis et en Angleterre, par exemple (Malet 2009).

6.3. Un développement professionnel au service de l'imputabilité ou de la réussite ?

La recherche, dégagée d'une conception positiviste telle qu'elle peut être utilisée dans certains contextes, tend tout d'abord à montrer que l'engagement des futurs enseignants dans la formation initiale, aussi bien que celui des enseignants en activité dans la formation, est fortement compromis par des politiques de type *top-down* et des dispositifs de reddition de comptes (*accountability*) en cours dans certains contextes, notamment anglo-saxons, où l'on a pu mesurer que la persistance dans l'emploi était problématique (Thompson, 2010).

A contrario, une vision du changement et de la formation envisagée de manière plus circulaire *top-down / bottom-up et outside-inside* (Mincu 2014), semble avoir des effets mobilisateurs et cohésifs, à la condition qu'un soutien soit apporté aux enseignants et aux formateurs dans ce dessein de construction de capacités individuelles et collectives (*capacity-building* : Fullan, 2007 & 2011) et que les mêmes enseignants soient reconnus et ne soient pas soumis à des règles d'évaluation sommative ayant des effets brutaux sur la communauté éducative et sur les enseignants (Hargreaves & Fullan, 2012).

Ces effets positifs sont notamment soulignés dans une enquête dirigée par Marisa Tatto (2014) menée dans quatre pays, en Finlande et à Singapour, qui contrastent très positivement avec les deux autres contextes nationaux enquêtés dans son étude, les États-Unis et le Chili, dans lesquels des politiques fortes de reddition de comptes sont menées (Tatto 2014).

Dans ce contexte de mobilisation positive visant l'engagement et une motivation intrinsèque des enseignants à travers, comme le souligne Mincu (2014), des partenariats pérennes entre les établissements scolaires, de coopération mais aussi de recherche (*enquiry-based education*), et d'autres établissements (*peer-to-peer based partnerships*) ou des institutions externes (comme l'université) dans le cadre de la mobilisation d'expertises dans une visée de conseil et

d'accompagnement (*advisory-support*), la formation présente des effets de stimulation de la communauté professionnelle et des individus (Collins *et al.*, 2012 ; Mincu 2014 ; Thomson, 2010).

Ces éléments d'appréciation, qui ont été explorés dans des recherches menées au Canada (Hargreaves *et al.*, 2009), en Écosse, au Pays-Bas et en Finlande (British Educational Research Association - BERA, 2014 ; Mincu 2014 ; Tatto 2014) et émanant de la littérature de recherche, sont désormais admis par les organisations internationales (OCDE, 2012). Des expérimentations dans des établissements scolaires français montrent aussi le potentiel de ce rapprochement des espaces de formation du terrain professionnel et de ces établissements pour construire des nouveaux espaces d'apprentissage par l'analyse de l'activité à travers des laboratoires du changement (Ria & Lussi Borer, 2013). Dans la littérature internationale sur le sujet, la fonction de la recherche apparaît décisive dans ce contexte de mobilisation des ressources individuelles et collectives pour la réussite des établissements et des enseignants, en formation initiale et tout autant en formation continue.

Le projet d'irriguer la formation et le développement professionnel des enseignants par la recherche n'est pas nouveau ; Lawrence Stenhouse (1975) montrait déjà l'importance de former des enseignants qui soient aussi des chercheurs : *teachers as researchers*. Cette conviction que la recherche est un levier majeur de professionnalisation est ainsi étayée: une posture de recherche au sens de production réflexive et de diffusion des expériences et des pratiques professionnelles, aurait un effet positif d'identification, de socialisation, de reconnaissance et d'affirmation professionnelle, mobilisatrice d'énergies et de ressources dans les établissements, à condition de créer des ponts entre l'expertise enseignante et l'expertise de recherche et de lutter contre le cloisonnement des espaces ; dans cette perspective, la formation des formateurs, à l'interface entre les terrains professionnels et l'université, est décisive (Foster, Wright & McRae 2008, Ria & Lussi Borer 2013).

Sur ce plan encore, la littérature de recherche permet de repérer que, dans certains pays, comme la Finlande, la Corée du Sud ou le Japon, l'organisation du temps de travail des enseignants prend en compte cette dimension collaborative et de recherche (Mourshed *et al.*, 2010, (cités par) Mincu (2014) ; OCDE, (2012). De tels dispositifs d'aménagement du temps scolaire se mettent aussi en place au Canada (Ontario Plan – Levin 2010). La fonction de l'encadrement des établissements scolaires a également été identifiée comme décisive par la recherche, dans la mise en œuvre, le soutien et l'accompagnement de dispositifs de professionnalisation « situés », et de postures de coopération collective autant que de recherche, que ce soit en formation initiale ou en cours d'emploi dans le cadre d'un tissu partenarial effectif : la question de l'organisation du temps scolaire et aussi celle de l'organisation écologique des écoles, sont essentielles, tout comme le sont les modalités de collaboration avec les partenaires et les usagers de l'école (Darling-Hammond 2000, Day *et al.* 2007, Fullan 2011).

Ces études montrent notamment que du fait de leur position stratégique dans le système, les chefs d'établissement sont en mesure d'intervenir positivement ou négativement, autrement dit de promouvoir ou d'inhiber le développement de dynamiques et d'initiatives de formation, de travail et de professionnalisation collaboratifs dans les établissements Fullan, 1990; Wong *et al.*, 1998 ; McLaughlin & Talbert 2006, repris par OCDE (2012) et Mincu (2014)).

Quid de l'idée d'autonomie professionnelle dans le processus? Pour Crozier (1963 : 218), dispose d'un pouvoir « celui qui détient une expertise qu'il pourra négocier dans la structure ». Il n'est pas assuré que la responsabilisation par l'autonomie contenue dans la promotion de l'organisation scolaire, ménage ce pouvoir. Toutefois, l'idée même de professionnalité enseignante est très mouvante dans le temps et l'espace, et même s'il est tangible qu'à certains égards les politiques contemporaines en direction de l'école et des enseignants affectent «

l'âme » du métier ou de la profession (Derber et Schwartz 1991), seule une conception naturaliste de la professionnalité enseignante pourrait nous rendre enclin à conclure, trop vite sur ce point. C'est une des vertus du comparatisme que d'engager à ne pas céder trop tôt à cette envie. Tout juste pouvons-nous avancer que si la tendance est dans certains contextes la coexistence de l'idée de professionnalisation avec celle de reddition de comptes. Nous observons aussi un processus d'hybridation à l'œuvre dans des sociétés nationales en interaction forte dans le contexte de l'eupéanisation des politiques. Cela est au final producteur de variations importantes, au-delà d'orientations programmatiques globales qui affectent les systèmes scolaires nationaux.

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Cultivating a notion of cosmopolitan education of relevance to Africa: Reflecting on a MOOC on teaching for change

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Cosmopolitanism in academic literature seems to be romanticised on the premise of the recognition of diversity and difference, and respecting and connecting with the other in its otherness. More recently, however, some philosophers of education have begun to look at a view of cosmopolitan education aimed at counteracting human and non-human injustices. The two views on cosmopolitan education are not necessarily in contradiction. We are attracted to a complementary view of cosmopolitan education that invokes both human engagements based on democratic iterations and autonomous and responsible actions, constituted by an allegiance to justice, and the cultivation of humanity. We proceed in the following ways by arguing that cosmopolitan education is a necessary and defensible form of education relevant to Africa. Firstly, we offer a defense of African philosophy of education. Secondly, we elucidate cosmopolitan education with an emphasis on a renewed understanding of the concept. And thirdly, we show the commensurability between cosmopolitan education and African philosophy of education and its relevance to Africa instigated by a complementary view of cosmopolitan education in relation to African thought and practice.

ترسيخ مفهوم التعليم الكوسموبوليتي ذي الصلة بأفريقيا: يعكس فكرة الدورات المكثفة المفتوحة عبر الإنترنت للتعليم من أجل التغيير:

يبدو أن الكوسموبوليتية في الأدبيات الأكاديمية تكون رومانسية على أساس الاعتراف بالتنوع والاختلاف، والاحترام والتواصل مع الآخر في أجزائه. لكن في الآونة الأخيرة، بدأ بعض فلاسفة التعليم ينظرون إلى وجهة نظر التعليم الكوسموبوليتي الذي يهدف إلى مواجهة الظلم الإنساني وغير الإنساني. وجهتي النظر حول التعليم الكوسموبوليتي ليست بالضرورة في تناقض. إننا ننجذب إلى نظرة تكاملية للتعليم الكوسموبوليتي الذي يستدعي كل من الارتباطات البشرية المستندة إلى التكرار الديمقراطي والإجراءات المستقلة والمسؤولة، التي يتركز عليها الولاء للعدالة، وزراعة الإنسانية. إننا نمضي قدماً بالطرق التالية من خلال القول بأن التعليم الكوسموبوليتي هو شكل ضروري للتعليم يمكن الدفاع عنه وملامه لأفريقيا. أولاً، نقدم دفاعاً عن فلسفة التعليم الأفريقي. ثانياً، نوضح التعليم الكوسموبوليتي مع التركيز على الفهم المتجدد للمفهوم، وثالثاً، نظهر مدى التناسق بين التعليم الكوسموبوليتي والفلسفة الإفريقية في التعليم وصلته بأفريقيا التي تحركها رؤية مكملة للتعليم العالمي فيما يتعلق بالفكر والممارسة الإفريقية.

培养有关非洲的世界主义教育理念：反思为改变而教学的慕课课程

在学术文献中，世界主义似乎被浪漫化了，因为它的前提是承认多样性和差异，尊重他人与接受差异。然而，近年来，一些教育哲学家开始探索另一种世界主义教育的观点，这种观点致力于对抗人性的和非人性的不公正。以上两种对世界主义教育的观点并不一定矛盾。本文倾向于一种世界主义教育的补充性观点，此种观点认为世界主义教育能够基于民主的互动来唤醒人们的社会参与感，也能激发人们自觉承担社会责任的行为。此种世界主义教育需要激发人们对公正的忠诚并培养人性。本文认为世界主义教育是一种必要的、正当的、与非洲有关的教育形式，并进行了以下几个论述。首先，我们辩护了非洲教育哲学的合理性。第二，我们用一种全新的理解阐述了世界主义教育的概念。第三，基于一个有关非洲思想与实践的补充性世界主义教育的观点，我们展示了世界主义教育与非洲教育哲学、以及非洲之间的相关性。

Cultiver une notion d'éducation cosmopolite de pertinence pour l'Afrique: Réfléchir sur un MOOC sur l'enseignement pour le changement

Le cosmopolitisme dans la littérature académique semble être romancé sur la prémisse de la reconnaissance de la diversité et de la différence, et du respect et de la connexion avec l'autre dans son altérité. Plus récemment, cependant, certains philosophes de l'éducation ont commencé à considérer une vision de l'éducation cosmopolite visant à contrer les injustices humaines et non-humaines. Les deux points de vue sur l'éducation cosmopolite ne sont pas nécessairement contradictoires. Nous sommes attirés par une vision complémentaire de l'éducation universelle qui invoque à la fois des engagements humains basés sur des itérations démocratiques et des actions autonomes et responsables, constituées par une allégeance à la justice et la culture de l'humanité. Nous procédons de la manière suivante en affirmant que l'éducation universelle est une forme d'éducation nécessaire et défendable pour l'Afrique. Premièrement, nous offrons une défense de la philosophie africaine de l'éducation. Deuxièmement, nous élucidons l'éducation universelle en mettant l'accent sur une compréhension renouvelée du concept. Et troisièmement, nous montrons la commensurabilité entre l'éducation universelle et la philosophie africaine de l'éducation et sa pertinence pour l'Afrique grâce à une vision complémentaire de l'éducation cosmopolite par rapport à la pensée et à la pratique africaines.

Культивирование понятия космополитического воспитания в актуальном контексте для Африки: размышления о MOOC по обучению для перемен

Космополитизм в академической литературе кажется романтизированным на пути признания разнообразия и различий, а также уважения и связи с другим в его инаковости. Однако в последнее время некоторые философы образования начали рассматривать взгляд на космополитическое образование, направленный на противодействие человеческой и нечеловеческой несправедливости. Два взгляда на космополитическое образование не обязательно противоречат друг другу. Нас привлекает взаимодополняющий взгляд на космополитическое образование, в котором задействованы как человеческие обязательства, основанные на демократических итерациях, так и автономные и ответственные действия, образованные преданностью справедливости и культивированием человечества. Мы действуем следующим образом, утверждая, что космополитическое образование является необходимой и оправданной формой образования, имеющей отношение к Африке. Во-первых, мы

предлагаем защиту африканской философии образования. Во-вторых, мы разъясняем космополитическое образование с акцентом на новое понимание концепции. И в-третьих, мы показываем соизмеримость между космополитическим образованием и африканской философией образования и ее актуальностью для Африки, спровоцированной взаимодействующим взглядом на космополитическое образование применительно к африканской мысли и практике.

Cultivando una noción de Educación Cosmopolita relevante para África: Reflexiones de un MOOC sobre la enseñanza para el cambio.

El cosmopolitanismo en la literatura académica parece haber sido idealizado bajo la premisa del reconocimiento de la diversidad y la diferencia, respetando y conectando con el otro en su otredad. Sin embargo, más recientemente, algunos filósofos en educación han comenzado a considerar una visión sobre la educación cosmopolita dirigida a contrarrestar las injusticias humanas y no humanas. Los dos puntos de vista sobre la educación cosmopolita no están necesariamente en contradicción. Nos atrae una visión complementaria de la educación cosmopolita que invoca tanto compromisos humanos basados en iteraciones democráticas como acciones autónomas y responsables, constituidas por la lealtad a la justicia y el cultivo de la humanidad. El artículo procede de la siguiente manera, argumentando que la educación cosmopolita es una forma de educación necesaria y relevantemente defendible para África. En primer lugar, ofrecemos una defensa de la filosofía de la educación africana. En segundo lugar, dilucidamos la educación cosmopolita con énfasis en una comprensión renovada del concepto. En tercer lugar, mostramos la commensurabilidad entre la educación cosmopolita y la filosofía africana de la educación y su relevancia para África instigada por una visión complementaria de la educación cosmopolita en relación con el pensamiento y la práctica africanos.

Introduction

In our recent book *Rupturing African Teaching and Learning: Cultivating Ubuntu Education* (Y. Waghid, F. Waghid, and Z. Waghid 2018), we reflect on a massive open online course (MOOC) we taught to almost 6,000 students from all over the world. The latter initiative is novel for two reasons. On the one hand, the MOOC, entitled ‘African Teaching for Change’ is the first of its kind in terms of content, and the first to be implemented on the African continent. On the other hand, innovation of the MOOC resides in the fact that students were expected to acquire at least three pedagogic competences: learning to act autonomously, learning to engage deliberately with one another, and learning to act responsibly and responsively. Autonomous action is linked to the idea that students can think for themselves and in turn come to their own speech—that is, they learn to articulate their points of view and thereby offer cogent justifications for arguments proffered. Such autonomous action invariably culminates in deliberative engagement in the sense that students articulate themselves, are being listened to, and in turn, show a willingness to listen to the critical views of others who talk back. And, most poignantly, autonomous, deliberative actions ought to have an ethical dimension whereby students are initiated into online pedagogic practices that can orient them towards acting responsibly—whereby they recognise that someone else has something worthwhile to say. And responsively where their actions would provoke them to act with a renewed enthusiasm for legitimate and plausible change. The latter implies that their pedagogic actions are geared towards remedying undesirable, indefensible, and distorted situations—that is, unjust situations—in the societies in which they live. And if students are afforded equal opportunities in voicing their opinions in classroom debates and discussions pertaining to issues influencing their own social contexts, then they are afforded the opportunity to make their own autonomous choices (Z. Waghid and F. Waghid 2018, p. 141). This article offers a cursory account of two

complementary forms of education: (1) African philosophy of education, and (2) cosmopolitan education that can enhance, we contend, autonomous, deliberative, responsible, and responsive actions.

Towards an understanding of a tenable form of African philosophy of education

We begin from the premise that inasmuch as there are multiple traditions and cultures prevalent among different communities on the African continent, the possibility of varying understandings of African philosophy of education is very likely. In this article, our understanding of African philosophy of education is constituted by an identification of major problems on the African continent—which include, HIV and AIDS, children warfare, genocide, hunger and poverty—and then to examine their implications for education. For instance, the recognition that a military dictatorship on the African continent is a human problem, brings to the fore understandings that have some ramifications for education. Thus, a military dictatorship is clearly at variance with democratic human engagement. The upshot is that educational relationships among humans are impacted negatively whereby some people (e.g., dictatorial rulers) act authoritatively without considering the views of others. In many ways, dictatorships quell democratic engagement in the sense that people are not allowed to elect their form of government but rather, authoritarianism is imposed upon them. In this way, autonomous human action is thwarted and people's aspirations and speech are dealt a dismissive blow. Education will be adversely construed and the possibility that people will engage deliberatively might become a human impossibility. In short, educational relations among people would be highly authoritarian.

A philosophy of African education that is constituted by authoritarianism does not augur well for the democratic process and by implication, deliberative ethos of human forms of living on the continent. Hence, if such a constrained understanding of African education is highly limited, the question is, what can an African philosophy of education do to engender a tenable form of education on the continent? We shall respond to the latter question in the following way. The recognition of the debilitating effects of genocide on the African continent is very much connected to the possibility that mass killings and assassinations are considered by many as unacceptable acts of human violence. Yet, recognising genocidal violence is not sufficient to cultivate a defensible form of African philosophy of education. Instead, undermining genocide and doing something to eradicate it would be more advantageous for communal living on the continent. In this way, the mere recognition of a major problem on the continent is not an enabling condition for change. Such a form of violence must be combatted and consistently undermined. Some of the educational implications that go along with the subjugation and eradication of genocidal violence are that people learn to co-exist and interconnect with one another. Their collective cultivation of a sense of community is informed by the willingness of people with diverse and contending points of view to want to live with one another's differences.

The point about the two forms of human living identified above, is, on the one hand, human living can be quite debilitating and its implications for education quite catastrophic as well. On the other hand, recognising that human relations can be communal and deliberative, and in contradiction with acts of violence, is a recognition that human relations can be underscored by an ethics of co-existence and interconnectedness. Both the above forms of living constitute two disparate forms of living that can be elucidated on the grounds of an African philosophy of education. And, considering that the latter view of education has been construed as more plausible and humanely acceptable does not mean that an African philosophy of education is inappropriate as a paradigm of African knowing, doing, and being. Rather, an African

philosophy of education constitutes conceptual and pragmatic ways in terms of which education on the African continent can be justified or not. It is with such an understanding of African philosophy of education that we want to examine two expositions of African education articulated by Kwame Wiredu (2005) and N'Dri Assié-Lumumba (2005) in order to show as to how such a conceptual and pragmatic approach to elucidating and clarifying education can actually work. Methodologically, our conceptual-pragmatic approach is also informed by a deconstructive-analytical inquiry whereby in interpretive ways we identify narratives in literary texts in and about cosmopolitan and African educational discourses to articulate our claims. Whereas, interpretive inquiry relates to uncovering meanings in texts, deconstructive scrutiny attempts to analyse some of the meanings that lie beyond a common understanding of texts. In both instances, that is, interpretive and deconstructive scrutiny, we rely on existing narratives in the literature to make our theoretically informed and pragmatically inspired claims about education.

Firstly, Wiredu (2005, p. 8) offers an account of African education that involves a harmonisation between individual and societal interests; engaging with others on the grounds of 'reflexive imagination', for instance, imagining others' experiences without experiencing others' difficulties oneself; and acting post-humanistically in the sense of recognising human and beyond human life experiences and, simultaneously honouring such experiences. Practising education in such a way, is tantamount to producing universal (global) and particular (local) knowledges that have a bearing on Africa's expansion (Wiredu 2005, p. 18). Acting both individually and socially are mutually intertwined, that is, such actions are reflective of one another. The commensurability between individual and societal actions, invariably makes it possible to imagine someone else's vulnerabilities with the equal possibility to change distorted and harmful practices. A poignant example is the disregard some people on the continent display towards human and non-human lives. Procuring the interests of both forms of life would be one way of circumventing the disgust and shame associated with a misrecognition of such forms of human and non-human living. For Wiredu (2005) a notion of African education, is constituted by a reflexive imagination that would oblige humans to reconsider their perhaps indefensible actions commensurable with justifiable human acts. Through reflexive imagination, humans can become more open towards understandings that might not have been there before, that is, a matter of imagining things and situations as they could be otherwise. The point we are making, is that an African philosophy of education is not just about identifying particular problems in society. Rather, an identification of the problem goes along with the quest to resolve it, such as to act with a reflexive imagination towards responding to irresponsible human and non-human actions. The understanding of African philosophy of education we are espousing here, is connected both to identifying and re-imagining a situation in light of enacting human responsibility—that is, we establish a connection between recognising a problem and to resolve it justly.

Second, Assié-Lumumba (2005, p. 23) articulates a view of African education whereby people endeavour to engender an autonomous, liberatory, and civil citizenry, that fuses apt aspects of other cultures with one's own culture on the basis of people remaining in a state of relationality (*ukama*). An autonomous citizenry that fuses varying cultures as constitutive of its own renewed culture at once recognises the significance of co-belonging. By implication, following Assié-Lumumba, an African philosophy of education does not merely involve an identification of human problems, but also, a recognition that such problems ought to be resolved in an atmosphere of liberation and civility. The likelihood that liberation and civility would be jeopardised would not only put human living at risk, but also dehumanise the civil intentions of an African philosophy of education. When, different human cultures are recognised and respected, the possibility to incorporate aspects of others' cultures become highly likely.

Consequently, respecting others' cultures assists and supports people in expressing their willingness to co-exist interdependently on the grounds of recognising one another's dignity and humanity (*Ubuntu*). As such, practising an African philosophy of education goes hand in hand with cultivating humanity vis-à-vis interculturalism, interdependence, and relationality.

Through the exercise of civility, humans always demonstrate a willingness to engage with one another's commonalities and differences. Through fusion, autonomous, liberatory, and civil human actions are possible in the sense that humans remain engaged and untroubled by diversity and difference. Considering that the African continent comprises diverse people with many different cultures, fusion would imply the enactment of their commonalities and differences in the interest of what is good for the continent. It is through an African philosophy of education that one recognises the potential of fusion to hold people together on the grounds of mutual respect for diversity and difference, that the possibility for resenting different lifestyles might be jettisoned. On the basis of people's civility there is always the possibility to recognise multiple ways of being and acting such as what is imagined through the cultivation of an African philosophy of education.

The upshot of the afore-mentioned view of an African philosophy of education articulated in unison with some of the seminal thoughts on African education espoused by both Wiredu and Assié-Lumumba, is that enacting such a discourse would imply that people are intent on fusing knowledge in such a way that they deliberately integrate the past with the present. This is so, because human living is considered relational and through a fusion between the past and the present, the possibility of improving people's lives could be an act of becoming. The latter implies that African people's attachment to the past and their attenuation of present human conditions are considered deeply intertwined or fused with the aim to produce more just forms of living—that is, forms of living that are not only more just, but also other forms of just living not yet conceived but which remain civil. Such an understanding of African philosophy of education brings the recognition of human autonomy, acknowledgement of differences, and possibly a fusion of different perspectives on life and knowledges into profound relationality—a concept couched as *ukama* (relational) in the African Shona language (Ndofirepi and Shanyanana 2015). The point is that showing civility through human co-existence and recognition of the importance of fusing knowledges, is what makes the concept of *ukama* relevant to African communities. This is so, because the sense of an autonomous self is constructed in relation to communitarian social constructions, thus bringing into play a concept of community in Africa that can be understood as interactions and interconnections rather than individuated human action (Ndofirepi and Shanyanana 2015, p. 428).

In sum, Wiredu (2005) and Assié-Lumumba (2005) help us in articulating a tenable notion of African philosophy of education which is constituted by a three-pronged approach. Firstly, through reflection (that is, looking for reasons and thinking about them) we identify major problems on the African continent that seem to hamper Africans' ways of being and living. Secondly, we justify or validate (through the offering of reasons) the existence of such problems. Thirdly, we determine what the consequences of these problems are to educational experiences. Whilst performing the aforementioned approach, we remain cognisant of bringing individual and social interests into conversation with one another, identifying people's vulnerabilities and thinking about ways of addressing these, advocating what can possibly advance African people's self-determination and freedom, and fusing what is considered universal (and perhaps global and dominant) and appropriate with what counts as local or indigenous and credible (Y. Waghid, F. Waghid, and Z. Waghid 2018). Bearing in mind the afore-mentioned understanding of an African philosophy of education, we now turn to an exposition of cosmopolitan education to ascertain as to whether the two different forms of education have some commensurability.

Making an argument for cosmopolitan education

The Greek cynic, Diogenes, introduced the idea of *kosmopolites* that describes a person as a citizen of the world. Put differently, people are considered strangers nowhere as they belong everywhere—that is, being citizens in a borderless world. The latter implies that the boundaries of the nation states are imaginary and people are welcomed everywhere in the sense that they are obliged to be treated hospitably wherever they might be or happen to migrate. The political philosopher Seyla Benhabib (2011) considers the hospitality people might encounter everywhere on account of being cosmopolitans as their universal right to be treated with dignity and honour. We refer to her words at length:

To live outside the boundaries of the city, according to Aristotle, one needed to be either a beast or a god, but since [wo]men were neither and since the *kosmos* was not the *polis*, the *kosmopolites* was not really a citizen at all but some other being. To Cynics such as Diogenes Laertius this conclusion was not particularly disturbing, since he claimed that rather than being at home in *the* city, the cosmopolitan was *indifferent* to them all. The *kosmopolites* was a nomad without a home, at peace with nature and the universe but not with the human city, from whose follies he distanced himself The negative vision of cosmopolitanism as a form of nomadism without attachments to a particular human city, as espoused by the Cynics, is transformed by the Stoics [who] argue ... a *kosmopolites* is one who distances himself either in thought and in practice from the habits and laws of his city and judges them from the standpoint of the higher order, often considered to be identical with reason, with nature or with some other transcendent source of validity These tensions between citizenship in a bounded community and cosmopolitanism are transformed when Kant, at the end of the eighteenth century, resuscitates the Stoic meaning of cosmopolitanism by giving the term a new turn that places it at the heart of the Enlightenment project. It is also with Kant that the term ‘cosmopolitan’ is transformed from denial of citizenship into that of ‘citizenship of the world’, and is linked to a new conception of human rights as cosmopolitan rights. (Benhabib 2011, p. 5)

At least three significant aspects emerge in the above exposition of cosmopolitanism: Firstly, a cosmopolitan is neither constrained by nor confined to a city or specific place. Rather, a cosmopolitan peacefully occupies a space anywhere in the world and cannot be subjected to hostile treatment even though their sojourn other than their place of birth is temporary. Secondly, a cosmopolitan has the right to be treated justly or hospitably on the basis of universal reasons. And, thirdly, cosmopolitans are moral persons who belong to a world republic in which they could potentially engage with one another without being constrained as immigrants.

What emanates from the afore-mentioned understandings of cosmopolitanism, is that cosmopolitan education is equally associated with human beings exercising their rights to forms of engagement. In other words, humans cannot be denied the right to engage with one another on the basis of not having permanent residency. It is a moral right to engage with all people irrespective of who they are and from where they come. Simply put, all human beings ought to be considered as ‘units of equal moral respect and concern in a world society’ (Benhabib 2011, p. 8). The benefit of such a cosmopolitan view of education is that participants in educational encounters, whether among teachers and students, ought to be considered as equal participants in such encounters where they exercise their rights on the basis of having the

right to do so without being constrained by others. In agreement with Benhabib, cosmopolitan education requires that university teachers and students be recognised as moral equals entitled to legal protection in virtue of rights that accrue to them as human beings and not nationals (p. 9). More poignantly, Benhabib also posits ‘In this global society, *individuals are rights-bearing not only in virtue of their citizenship within states, but in the first place in virtue of their humanity*’ (p. 13).

The advantage of the afore-mentioned account of cosmopolitan education has some connection with what it means to pursue an African philosophy of education. In the first place, teachers and students can only identify problems on the African continent on the basis of a justification of what such problems entail. Based on the possibility of exercising their communicative freedom, university teachers and students, in a cosmopolitan way, can come up with rational justifications as to what makes problems what they are. And, for the exercise of communicative freedom to happen, they (teachers and students) have to engage in what are referred to as democratic iterations, that is, ‘complex processes of public argument, deliberation, and exchange through which universalist rights claims are contested and contextualized, invoked and revoked, posited and positioned throughout legal and political institutions, as well as in the associations of civil society’ (p. 16). The distinctiveness about democratic iterations is that humans do not merely engage about this or that, but more poignantly, their actions are guided by the right to disagreement and dissent. In other words, people do not necessarily agree with everything someone else proffers. Rather, democratic iteration implies that people have the right to disagree with one another in an atmosphere of public confrontation and recognition of debate and disputation. When teachers and students are mutually engaged in democratic iterations they do not merely act in defiance of this or that but they also proffer reasons for their disagreements. Instead, their own voices are heard and listened to in a discourse of articulation and talking back. In this way, teachers and students act autonomously in the sense that they exercise their right to disagree and, simultaneously they are listened to in order to conjure up more defensible judgments in a spirit of talking back. In this regard, Benhabib posits that ‘Every iteration transforms meaning, adds to it, enriches it in ever so subtle ways’ (p. 129). And, when major problems on the African continent, for instance, are identified and argued for through democratic iterations, teachers and students are engaged in public deliberation that enables them ‘to judge as *legitimate* or *illegitimate* processes of opinion and will-formation through which rights claims are contextualized and contested, expanded and revised through actual institutional practices in the light of such criteria’ (p. 130). The point is, democratic iterations, as practices within cosmopolitan education, would provoke people to act autonomously, deliberatively, and responsibly—those ways of doing reminiscent of doing African philosophy of education. Responsible human action that is enacted on the basis of democratic iterations endorses a cosmopolitan position whereby people exercise their communicative freedom to speak their minds, come to speech, and either reach agreement or disagreement.

In the next section, in reference to a MOOC on Teaching for Change we show as to how such a cosmopolitan position has been practiced in relation to deliberative encounters among ourselves (university teachers) and students.

Some reflections on a MOOC on Teaching for Change and its implications for cosmopolitan and African philosophy of education

Our MOOC on Teaching for Change began as a pedagogic initiative between Stellenbosch University and Future-Learn, which is owned by the Open University in the UK. As authors of the MOOC we decided on an African philosophical approach to teaching and learning that is

premised on the idea of both *Ubuntu* (human interdependence) and *Ukama* (relationality). Our interest in African philosophy of education stems from the idea that in African societies doing things in association with one another—that is, communally—and, embarking on pedagogic initiatives by invoking the self-understandings of participants in relational fashion, are considered as meaningful to human co-operation and interdependence. By implication, the premise on which our pedagogic approach is based in implementing the MOOC, is that teachers and students reason together and come up with ways as to how to address pedagogic and societal concerns. We shall highlight three pedagogic encounters that constitute our MOOC in particular how students and teachers engaged autonomously, iteratively, and responsibly.

Firstly, when students engaged with two specific notions of African philosophy of education such as an orally narrational and communitarian approaches they recognised that both approaches rely on the justification of reasons. On the one hand, students identified the importance of oral narratives in elucidating concepts in and about African education, whereas, on the other hand, they recognised the authenticity of reasons in explicating communitarian ways of being. The point is, both approaches to African philosophy of education is conceptually linked to the proffering of explanations and clarifications. An orally narrational approach to African philosophy of education relies on the use of explanations offered by say, sages within African communities, whereas, defending a communitarian approach to African philosophy of education requires that people proffer reasons in a justifiable and communicative way. What is quite significant about their justifications, is that students recognised the importance of being reflexive and open about that which is indigenously known to them. In other words, they did not merely internalise understandings of African education in an uncritical manner. Instead, their own understandings of African education came to the fore as a consequence of having made sense of such understandings and the necessity to proffer reasons in defence of their justifications. More specifically, students were intent on giving an account of their understandings of African education to the extent whereby they were open and willing to consider different understandings of African education.

In this way, following Hansen (2011), their reflective openness to what is known to them—that is, their indigenous ways of being—connect their pedagogic actions to a cosmopolitan take. The view that cosmopolitanism first requires of people to be open and reflexive about their own traditions, cultures, and ethnicities enhances the view that they themselves had to engage iteratively with views of the traditions and ethnic cultures. The point is, for students engaged in the MOOC to have come to their own autonomous understandings of African education, implies that they had to engage deliberately in association with our (teachers) and other students' thoughts about African education. Students' engagement with thoughts in and about African education has been guided by understandings of why and how African education connect and or differ from other forms or philosophies of education. Many students also wanted to ascertain as to how African education differs from other and different forms of education such as Russian, Mexican, and or Western education. In addition, students' reflexive openness to the known—that is, their own indigenous ways of acting and being—is a matter of having acted in a cosmopolitan way. This is so, on the grounds that cosmopolitan education is connected to people engaging with others' thoughts about a matter and then to proffer their own understandings of it in relation to their informed opinions and will formation. It was not as if students were presented with immutable understandings of African education. Rather, their understandings of such notions of education emerged from the interdependent self-understandings of people as they endeavoured to iteratively and democratically come to speech. What is quite significant about some students' views on African education, is that Africans (humans) can learn from others' stories which makes individual and cultural purity

impossible to conceive of as constitutive of African ways of thinking, acting and being. It is here that we agree with Hansen (2011, p. 9) when he purports the following:

The cosmopolitan premise that individual and cultural purity is impossible suggest that influence from without is unceasing and that, given an increasingly crowded world, people would be well served to respond to it thoughtfully—as contrasted with reacting to it passively or violently—if they wish to retain individual and cultural integrity.

Like Appiah (2005, p. 257), we recognise that human capacities to think, reason, disagree, speak, listen, and be listened to are important in our construction and reconstruction of understanding. And, constructing and reconstructing an African notion of education depends on the cosmopolitan premise of cultural borrowing and exchange, respecting others' rights universally, and people being reflectively loyal to the known (Hansen 2011, p. 11).

Secondly, what also emanated from our pedagogic encounters with students through the MOOC on Teaching for Change, is that students recognised the need to serve a justice which is not yet (Hansen 2011, p. 13). What students identified through the MOOC is that deep rooted human problems on the African continent such as military dictatorships, ethnic and tribal conflict and wars, famine and hunger, lack of adequate food production and malnutrition, the HIV and AIDS pandemic, and student revolts, cannot just be ongoing without seeking to resolve such problems. In other words, students recognised the need for thoughtful, rigorous and dispassionate inquiry that can lead to an eradication of injustices on the African continent. Our task as university teachers was to find the pedagogic space to connect students to real problems and then to collectively find ways as to how human problems can be addressed and resolved. What is quite significant in our pedagogic encounters through the MOOC, is that students saw the need to articulate understandings and arguments in quite an imaginative fashion, that is, conceiving of and thinking up possibilities—those which are not yet—as to remedy problems on the continent. In this way, their education around cosmopolitanism came to the fore whereby they not only thought reflexively and openly about what is known to them, but also about them becoming more responsive to that which is not yet. To put it more succinctly, their education became associated with engaging with encounters known to them and imaginatively with the new—a matter of occasioning 'new thinking rather than merely projecting into it prior understandings and assumptions' (p. 12). We are specifically reminded of how some students imaginatively came up with ideas as to how child wars on the African continent can be eradicated. To our mind, we were engaged in cosmopolitan education in the sense that we considered multiple and diverse perspectives on how African education can 'be open reflectively to the world *and* loyal reflectively to the local (including to one's values)' (p. 18).

Thirdly, what we found quite fascinating about students' learning through the MOOC on Teaching for Change, is that they invariably wanted to see the world as a better place to live in. In other words, from their perspective a MOOC on Teaching for Change should be directed at real change which implies an enactment of human responsibility and responsiveness to the human and non-human world. Most, if not all of the discussion posts (forums) on the MOOC platform seem to be linked to education for cosmopolitanism whereby students wanted to see a world in which 'a responsible, lawful, loving, thoughtful treatment of the whole cosmos' is at play (Papastephanou 2015, p. 17). From our gleanings of the student posts, there were lucid articulations of students of 'how responsibility must be construed, and the level of awareness of historical debt that burdens (principally but not exclusively) those who have been very active in creating inequalities, global asymmetries, hunger, poverty, destruction, and other pathologies inflicted upon others or upon nature' (p. 17). We agree with Papastephanou that

‘the cosmopolitanism [and cosmopolitan education] that is now largely endorsed has come to be seen as a glorification of diversity and a celebration of global mobility and border crossing’ (p. 18). What emerged from our MOOC of Teaching for Change, was a more enriched and reconceptualised form of cosmopolitan education ‘that touches upon issues of justice from a treatment perspective rather than from an intercultural modus vivendi consensus and agreement perspective’ (p. 23). Thus, rather than being concerned primarily with cultivating human relations based on an ethics of difference, disagreement and diversity, the understanding of cosmopolitan education that emerged from our MOOC centred around the disentanglement of humanity, including Africans, from the ‘pending debts created by past exploitation, requirements for a settlement of damages, and a varying relevance of amnesty and amnesia as decisive factors in conflict resolution, distributive duties, and institutional world measures’ (p. 228). Through our MOOC, students not only engaged with dystopias such as increasingly militarised empires on the African continent, hatred toward foreigners on the same continent, increasing marginalisation of the jobless, and increasing criminalisation and drug abuse especially in South Africa. Instead, students were also intent on proffering possible solutions to remedying dystopias. This makes their cosmopolitan education commensurable with the eradication of injustices rather than just focusing on cultivating a recognition of diversity and difference. By implication, their understandings of African education have been in consonance with cosmopolitan aspects of education. And, the pursuit of an African philosophy of education made it possible for students to have identified the commensurability between different forms of education especially in relation to the rationales that constitute such forms of education.

Conclusion

In this article, we have shown that there is a commensurability between the cultivation of a renewed form of cosmopolitan education and an enactment of African philosophy of education. Our understanding of African philosophy of education is constituted by at least three interrelated actions: (1) identifying major problems on the African continent, (2) proffering defensible reasons to justify human and non-human problems, and (3) imagining ways as to how problems can be justly remedied. Thereafter, we have shown as to how a renewed understanding of cosmopolitan education—one that focuses on the exercise of the just treatment of others—can possibly enhance the alleviation and eradication of problems on the African continent. In turn, we have shown as to how the cultivation of the latter understanding of cosmopolitan education commensurate with the cultivation of an African philosophy of education that can undermine injustices and other dystopias. Finally, we have shown, as to how a MOOC on Teaching for Change can be used as a pedagogic online initiative to enact criteria of cosmopolitan education as students and university teachers endeavour to undermine dystopias in the world, especially on the African continent.

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Religion and education: Comparative and international perspectives edited by Malini Sivasubramaniam and Ruth Hayhoe. Oxford, UK: Symposium Books, 2018. 388 pp. £52.00, (paperback). ISBN: 978-910774-01-7.

Readers of this edited collection *Religion and education: Comparative and international perspectives* are immediately invited into a field of scholarship that is both complex and fraught. In crafting this review, I quickly became aware of my positionality as a person who had a strong religious education in the Catholic Church, having attended Catholic schools for both my primary and secondary years. My reading of this collection of papers about religion and education are shaped by these foundational education experiences—it can be no other way. I also extend from this orthodoxy. Early in my schooling, I was introduced to Australian Indigenous esoterica, Judaism, Sufism, Buddhism, and Confucianism within my comparative religion classes. I was taught the importance of inter-faith dialogue even as we sang songs about “Our God reigns.” I pursued my interest in Buddhist philosophy into my doctoral studies and became a practitioner of Theravādan Buddhism. I think of myself as a Buddhist Catholic if I am asked to define myself. I quietly read each chapter with questions about what each had to say about how religion emerges into postcolonial, heterogeneous global society from its traditional historical roots shaped by homogeneity, and what role religion and religious education now plays in mainstream education systems across the world.

In the selection of texts, the editors Malini Sivasubramaniam and Ruth Hayhoe aimed to introduce a number of broad questions regarding religion and education, organizing the book into three broad sections: Internationalising/Globalising Religious Values, Curriculum, Pedagogy, and School Leadership, and Religion in Policy Processes and Conflict Resolution.

The first section, “Internationalising/globalising religious values,” includes six chapters. The first (Marshall) provides a global perspective about the pitfalls of trying to deliver education goals without including religious institutions. Marshall identifies six areas where religious institutions play a key societal role in the provision of education. The chapter highlights the tensions inherent in attempts to globalize religious values. The second chapter (Li) explores the influence of Confucianism in the modern context of China’s engagement with African nations where Confucian ideals are mobilized to enable collaborative development partnerships and it examines the Confucian approach to values education that are being shared and interpreted locally. The third chapter (Hwang) compares Christian religious higher education provision in Korea and Canada, highlighting the evangelizing mission of this work and its contribution to the internationalization of higher education. The fourth chapter (Niyozov) discusses the role of Islamic education in the nation-building efforts of Tajikistan and how globally-emergent Islamic values are being understood and brought into Tajikistan education. The fifth chapter (Seeberg, Luo and Na) returns the narrative to China and explores the way that a Catholic religious education and Catholic values are seen to protect young women migrant workers in Western China. The sixth chapter (Hayhoe) takes an historical approach, examining the impact of Buddhism, Taoism, and Confucianism on early Christianity, suggesting that such early

examples of inter-faith dialogue provide insights into the opportunity of dialogues to enhance the development of respect and of shared “global” values.

Section Two, “Curriculum, pedagogy, and school leadership,” also includes six chapters. The first, Chapter 7, (Wong) provides insight into faith-based religious education in Hong Kong by comparing four religious schools—Catholic, Protestant, Taoist, and Buddhist—across a range of aspects. Chapter 8 (Wu) discusses education of Muslim Hui people in the Chinese education system and how they maintain their traditional religious education. Chapter 9 (Niyom, Jumsai, Ratchatatanun, and Vokes) moves the discussion to Thailand where three Principals explore how to integrate Buddhist religious education into the Thai national curriculum in their schools. Chapter 10 (Herzog and Adams) compares issues in Bangladesh and Senegal involved in modernizing Islamic education, navigating the historical legacy of earlier education systems, and modern interpretations of Islamic education within national schooling. Chapter 10 (Sivasubramaniam and Sider), in their comparison of education provision in Haiti and Kenya, consider the religious influence of faith-based, low-fee private schools. The final chapter of this section, Chapter 11, (Katz) examines the development of the Israeli education system and the impact of secularism, religiosity, and ethnic identity on the provision of education.

Section Three, “Religion in policy processes and conflict resolution,” includes five chapters. The first, Chapter 12, (Barnes) focuses on the role of religion in policy-level discussions about the provision of education in Northern Ireland. Similar to other chapters (Hwang, Niyozov, Wu, Niyom et al., and Katz), Chapter 13 highlights how current state-based solutions have been fundamentally shaped by religious historical antecedents and ongoing ethnodoxies. Chapter 14 by Kidwai discusses the attempt by the Indian government through the influence of policies to shape how Islamic madrassas undertake religious education. The next Chapter 15 (Lisovskaya) turns our gaze to Russia where education policy has returned to a cautious endorsement of religious education. Ghosh and Chan in Chapter 16 make an argument for the importance of education systems to develop a more sophisticated form of religious education that can address the influence of religious extremism, basing their study on work being done in Canada. The final Chapter 17 by Collet and Bang provides a comparative analysis of how a number of Western democracies are engaging with heterogeneous religious populations within their borders, examining how they are approaching religious education and education about religions within these school systems.

The collection gathered by Sivasubramaniam and Hayhoe introduces the reader to an array of scholarship about the relationship between religion and education. Its canvas is bravely international but as Keith Watson, Emeritus Professor of Comparative and International Education, observes in his Foreword, “there are few comparative studies in the true sense of the word” (p. 15). In their Introduction, the Editors explain the importance of considering religion anew because of the re-emerging links between religion, radicalization, and global migration, despite expectation that globalization would lead to the demise of religion. They argue that mobilizing religion and religious institutions is a key to many societies achieving the Sustainability Development Goals, even as global institutions are attempting to achieve these goals through secularized dialogue with nation states. Early in the book, it becomes clear that Sivasubramaniam and Hayhoe see a value in religion and religious education that is not necessarily shared amongst global policy makers and nations. They set out to explore their core idea as being that “in equipping the next generation, religious education must be rooted in respect and must nurture the capacity for inter-faith dialogue and understanding of other religions” (p. 24). In doing so they have opened a Pandora’s Box of issues, concerns, problems, and views that suggest that the field of research into this important topic is emergent rather than formed and that scholars of comparative and international education have a role to play in understanding what place religion might have in contemporary education systems.

In conclusion, there is much promise contained in these papers. Their eclecticism provides rich opportunities for the development of this field of research. Their collection raises questions about definitions, methodological approaches, and theories. What is religion in the modern world? What is its relationship to spirituality? Should states or religious institutions control religious education? Given the important role of parents in school choice and in religious education (or not), their contribution needs to be a focus of future research as well. What is the role of state-sponsored moral education within mainstream schooling in the face of values education controlled by religious institutions? Clearly the positive influence of religion in education has outlasted the emergence of secular humanism, but equally its power to divide has not been silenced by inter-faith dialogue. Beyond history and vested interests, many human beings continue to want religious guidance in their lives. Where they seek that guidance and how it influences their behaviour towards other humans, other sentient beings, and indeed the planet may well be one of the most pressing educational issues of our time.

Zane Ma Rhea
Monash University

About the Author

Ma Rhea's research investigates how wisdom might be developed in modern education systems, addressing the alienation from mainstream education that people from non-dominant cultures report, arguing that full participation as citizens requires that education enables inclusion of diverse student needs through understanding the impact of ancestry, ethnicity, and culture on the provision of mainstream education services. She employs theoretical perspectives drawn from Indigenist, social exchange, organisational change, and intelligent complex adaptive systems theories to develop an understanding of how to incorporate a diversity of ethnoreligious cultural perspectives within mainstream education and in the leadership and management of education services. Her research scope encompasses: upholding Indigenous and traditional wisdom in modern universities and schools; negotiating traditional environmental knowledge into contemporary land, water, and food studies; embedding wise, culturally-inclusive pedagogies; and, an overarching study of the pedagogies of wisdom development in university and school students.

Learning as development: Rethinking international education in a changing world by Daniel A. Wagner. New York & London: Routledge, 2017. 324 pp. \$44.95 (paperback). ISBN: 978-1-84872-607-9.

Learning as development, by Daniel Wagner, is a new and welcomed entry into the collection of introductory texts that address education and international development. In this text Wagner posits that economic analyses and outcomes that privilege “national or individual income” over broader life goals are no longer adequate; rather, the field of international development must focus anew on more genuine forms of human development and, most specifically, on learning (p. 2). Indeed, understanding, measuring, and increasing learning lies at the crux of the book and, as Wagner contends, at the heart of development.

The book is organized into four key sections. The first section explores various lenses through which to understand the intersections of “International development,” “Human development,” and “Learning as development.” Each of these three areas receives its own chapter (Chapters 1-3). The second section draws inspiration from stage theorists and addresses across three chapters three pivotal moments of the human lifespan (Chapters 4-6). These chapters explore “Learning in early childhood,” “Children and basic skills,” and “Youth and adult learning.” The third macro section of the text concerns the ways in which the social institutions and activities of schooling and teaching, respectively, influence students’ development, as well as how international development agencies and theorists have approached both schools and the roles of teachers (Chapters 7-8). The fourth and final section explores several recent movements in the field (Chapters 9-12). These include “New technologies,” “Globalization and the environment,” “Measurement of learning,” and “Learning equity.” Concluding the text is a brief epilogue, wherein Wagner summarizes core concepts and leaves readers with a call for increased collaboration to address global issues.

This framework suits the text, which overall is quite accessible. Some other books in this sub-genre are either overly dense—and therefore too complex for introductory texts—or too general, and therefore lack the specificities to guide further exploration. To paraphrase Goldilocks and the Three Bears, the scope and tone of this text seems “just right.” Chapter One, for example, examines “International development” and includes a particularly useful overview of how various disciplines may perceive and approach development, broadly conceived. Here Wagner highlights how the lenses of economics, sociology, political science, psychology, anthropology, and interdisciplinarity frame development programs and problems as well as the possibilities for solutions. While some nuance regarding disciplines’ various epistemological assumptions is lost, this overview is quite accessible for readers who may have limited experience with traditional disciplines. Moreover, this chapter includes clear summaries of core theories that underpin various aspects of education and international development (e.g., Rostow’s stages of growth and Bourdieu’s cultural capital). It would be impossible to include all theorists and theories and, therefore, some are obviously overlooked; however, Wagner curated an important sample of key people and ideas and, perhaps more importantly, explained clearly how and why they are significant.

The book also emphasizes lived experiences and empirical evidence. Each chapter begins with a short vignette of a person and how they encountered education and international development, and then concludes with a retrospective of that individual's life, taking into account what has been learned about the given topic (e.g., early childhood) throughout the chapter. These snippets help to ground the theory and practice in the everyday lives of people across contexts as diverse as Peru, Nigeria, and Turkey. Wagner also opted to save endnotes for the end of each chapter rather than using in-text citations or endnotes at the bottom of the page. This was a smart decision—given the audience for the text—because it enhanced readability while still enabling ambitious and curious readers to locate both references and supplemental commentary. The detailed endnotes at the back of every chapter are very beneficial; some readers may even want to keep one finger in the endnotes to attain as much insight as possible. Moreover, the book includes many tables, charts, graphics, and even cartoons to keep the reader engaged. A few of the charts and graphs would benefit from additional explanation, but overall these visual representations help represent core concepts and generally add to the book's readability.

On a more conceptual level, *Learning as development* engages with key tensions in education and international development. It is evident throughout the text, for example, that there has been and continues to be a tension between universalist assumptions of knowledge, learning, and schooling, on one hand, and more culturally-specific and locally-informed perspectives, on the other. To address this tension Wagner employs a wide range of research evidence to illustrate key points, often acknowledging that readers and consumers of research ought to be careful of over-generalizing findings from across different contexts. For example, Wagner notes, “considerable research, *mainly from Western countries*, has shown the importance of parents reading storybooks to children in the early years of schooling” (p. 101, emphasis added). Given the potentially dangerous implications of applying research findings uncritically across contexts, it is refreshing to see in a text of this broad nature attention to the sites of data collection and knowledge production.

Texts of this scope are hard-pressed to address the wide range of issues related to education, learning, and development. This one does a particularly good job of exploring many important topics, though some are necessarily dealt with in greater detail than others. For example, educating students with disabilities receives scant attention throughout the text, whereas approaches to literacy and early childhood education remain primary foci. Likewise, the chapter on measurement and assessment, (Chapter 11), highlights the growth of this domain within international development, but falls short of exploring the nuanced differences between knowledge production (i.e., research) and assessments of knowledge (i.e., examinations and evaluations). In sum, in the privileging of certain topics and lenses of over others there are nuances lost. This is to be expected, however, and overall the text includes a rich description of many foundational ideas and approaches to education and international development.

In conclusion, I think this is an excellent text with wide appeal. As someone who teaches and works with students of both “teacher education” and “development studies,” I could envision using this text as a foundational volume across my undergraduate and post-graduate courses. Its concerted focus on education is likely to maintain the attention of my often more domestically-focused pre-service teachers, and its insights into the theory and practice of international development will challenge my non-education students. *Learning as development* therefore appropriately straddles the convergence of these readers and audiences. It provides a strong overview of the field and proposes several newer frameworks to help situate learning at the fore of educational policy, planning, and practice and, importantly, of human development. All things considered, I believe the scope and focus of this text is “just right,” a remarkable feat for an introductory text, and one that bears noting.

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About the Author

Matthew A. M. Thomas is a lecturer in Comparative Education and Sociology of Education at the University of Sydney. He holds a PhD from the University of Minnesota and an MA from Columbia University, Teachers College. Matthew has worked as a public school teacher, teacher educator, researcher, and consultant across diverse contexts, including Australia, Mali, Nigeria, Indonesia, Tanzania, the United States, and Zambia. His research examines educational policies, pedagogical practices, teachers' lives, and the changing roles of teacher education institutions.

Profile of a comparative and international education leader: Erwin H. Epstein¹

By Stacy Patton-Taylor and W. James Jacob
University of Memphis, USA

Professor Erwin Epstein's profile is a biographical sketch of Erwin's upbringing, education, and contributions in comparative and international education. This profile also documents his distinguished career in which he rose to senior leadership positions in national, regional, and international academic professional organizations in the US and abroad, including serving as President of the Comparative and International Education Society (1981), President of the World Council of Education Societies (1980-1983), and Editor of the *Comparative Education Review* (1988-1998). The article is based on multiple data gathering techniques and oral interviews. Article highlights include a review of some of Erwin's key family and career milestones, an overview of the tremendous impact he has had on the field of comparative and international education, as well as his opinion on challenges facing comparative and international studies today.

Keywords: Erwin Epstein, Pioneer Leaders, Leadership, Mentorship, Historian

نبذة عن أحد رؤساء التعليم المقارن والدولي:

اروين اتش إبستين

هذه النبذة الشخصية للبروفيسور إيروين إبستين تمثل رسماً بيوجرافياً عن نشأة إروين وتعليمه ومساهماته في التعليم المقارن والدولي. يوثق هذا الملف أيضاً مسيرته المتميزة التي ارتقى فيها إلى مناصب قيادية رفيعة في المنظمات المهنية الأكاديمية الوطنية والإقليمية والدولية في الولايات المتحدة والخارج، بما في ذلك العمل كرئيس لجمعية التعليم المقارن الدولية في (1981)، وتوليئه رئاسة المجلس العالمي لجمعيات التعليم (1983-1980)، وكذلك محرر مراجعة التعليم المقارن (1998-1988). يستند هذا المقال على تقنيات جمع البيانات المتعددة والمقابلات الشفوية. كما يشمل مراجعة لبعض المعالم الرئيسية والأسرية لإروين، ونظرة عامة على التأثير الهائل الذي أحدثه في مجال التعليم المقارن والدولي، بالإضافة إلى رأيه حول التحديات التي تواجه الدراسات المقارنة والدولية اليوم.

国际比较教育先锋人物简介：欧文·H. 爱泼斯坦

欧文·爱泼斯坦教授的人物简介概述了欧文的成长、教育及其对世界比较教育的贡献。此简介也记录了他杰出的职业生涯，包括他在美国和世界各国家、地区和世界的学术专业组织中的领导经历。他曾任国际比较教育学会主席（1981），世界教育学会理事会主席（1988-1998），以及《比较教育研究》杂志的编辑。这篇文章的资料基于多种资料搜集方法，以及口述访谈法。本文重点整理了欧文的一些家庭和职业的里程碑事件，回顾了他对于国际比较教育领域的重大影响，以及他看待当代国际比较教育研究所面临挑战的一些观点。

¹ This draws heavily from multiple interviews conducted by the authors with Erwin H. Epstein on 20 November 2014 and 28 February 2018. All of the uncited direct quotes in this profile derive from these interviews.

Profil d'un leader de l'éducation comparée et internationale: Erwin H. Epstein

Le profil du professeur Erwin Epstein est une esquisse biographique de son éducation, sa formation et ses contributions à l'éducation comparée et internationale. Ce profil renseigne également sur sa brillante carrière dans laquelle il a accédé à des postes de direction dans des organisations professionnelles universitaires nationales, régionales et internationales aux États-Unis et à l'étranger, notamment en tant que président de *Comparative and International Education Society* (1981), président de *World Council of Education Societies* (1980-1983) et éditeur de *Comparative Education Review* (1988-1998). L'article est basé sur des techniques de collecte de données multiples et des entretiens oraux. Les points saillants de l'article comprennent un survol de certaines étapes clés de la famille et de la carrière d'Erwin, un aperçu de l'impact considérable qu'il a eu dans le domaine de l'éducation comparée et internationale, ainsi que son opinion sur les défis des études comparatives et internationales.

Краткий биографический очерк лидера в сравнительном и международном образовании: Эрвин Х. Эпштейн

Краткий биографический очерк профессора Эрвина Эпштейна представляет собой описание воспитания, образования и вклада Эрвина в сравнительное и международное образование. Этот очерк также свидетельствует о его выдающейся карьере, в которой он поднялся на руководящие должности в национальных, региональных и международных академических профессиональных организациях в США и за рубежом, в том числе в качестве президента Общества сравнительного и международного образования (1981), президента Всемирного совета образовательных обществ (1980-1983) и редактора "Сравнительного обзора образования" (1988-1998). Статья основана на многочисленных методах сбора данных и устных интервью. Основные моменты статьи включают обзор некоторых ключевых семейных и карьерных вех Эрвина, обзор огромного влияния, которое он оказал на сферу сравнительного и международного образования, а также его мнение о проблемах, стоящих перед сравнительными и международными исследованиями сегодня.

Perfil de un Líder en Educación Internacional Comparada: Erwin H. Epstein

El perfil del Profesor Erwin Epstein es un esbozo biográfico de la crianza, la educación y las contribuciones de Erwin en la educación comparada y la educación internacional. Este perfil también documenta su distinguida carrera en la cuál ascendió a altas posiciones de liderazgo en organizaciones profesionales académicas nacionales, regionales e internacionales en Estados Unidos y en el extranjero, incluyendo su desempeño como presidente de la Sociedad de Educación Comparada Internacional (1981) Presidente del Consejo Mundial de Sociedades de Educación (1980-1983), y editor de *Comparative Education Review* (1988-1998). El artículo se basa en múltiples técnicas de recopilación de datos y entrevistas orales. Los puntos destacados del artículo incluyen una revisión de algunos de los hitos principales de la familia y la carrera de Erwin, una descripción del tremendo impacto que ha tenido en el campo de la educación internacional comparada, así como su opinión sobre los desafíos que enfrentan los estudios comparativos internacionales hoy.

Erwin H. Epstein is Professor Emeritus in the Department of Cultural and Educational Policy Studies, Loyola University Chicago. Erwin's lifelong dedication and research in social stratification, comparative education theory, and educational policy places him as a leading expert in comparative and international education (CIE). Erwin's tireless enthusiasm continues to offer provocative and deep intuitive understanding in CIE.



Erwin H. Epstein at Chicago, 2018.
Photo courtesy of Erwin H. Epstein.

There is no doubt that Erwin continues to be an influential leader and mentor for many students, colleagues, and international educators worldwide. Comments from some of these individuals note how Erwin helped them to develop into the scholars they are now, and how he was passionate and committed, and challenged them to be better. Erwin was renowned for preparing the next generation of CIE scholars and leaders and for supporting their continuation and growth in the field. Lou Berends and Maria Trakas described his mentorship role as follows:

Our experience in the Comparative and International Education ... area of the Cultural and Educational Policy Studies program at LUC [Loyola University Chicago] was marked by the expertise and commitment of Dr. Epstein. Without Dr. E.'s guidance, critique, and continual dedication to his students, we would not have had the kind of experience we both anticipated and expected when applying to LUC. As ... Comparative and International Education ... at LUC moves forward, students and faculty alike would do well in adopting similar strategies of community building and scholarly discourse that Dr. E. brought to the Loyola community. (Berends and Trackas 2011, p. 4)

Erwin's CIE footprint has brought global attention and respect as well as significant understanding to the core of academic equity and achievement. The bonds he has established continue a legacy of importance in CIE.

Erwin Epstein's Family

Born to Louis N. Epstein and Charlotte Epstein (nee Kozin) on 2 January 1939, Erwin was raised in a Jewish family with his older sister (b. 1935) and younger brother (b. 1946) in Chicago, Illinois.

Erwin's father was born and raised in Chicago and was determined to become a lawyer; he paid for his law schooling by working a night job. Erwin's mother was born in Moldova as the Russian Revolution and persecutions were taking place. As a result of political unrest in Moldova, Charlotte's maternal uncle sent for Charlotte (who was then 9), her mother (Erwin's grandmother), and her four brothers to be brought to the United States. "Both my mother's family and father's family were very poor," Erwin reflected. Reminiscing on his childhood, Erwin said:

When I grew up in Chicago, we lived in a small apartment with three generations of people, including my grandmother, my parents, my siblings, and me. It was a bit crowded but we didn't think of ourselves as being poor. We just thought that this was the way life was and grew up that way. Later on, my father was able to amass a little bit of wealth and moved us to a suburb. In terms of my childhood, it was a kind of a lower middle class upbringing.

Erwin's older sister, Sandra, was somewhat of a prodigy and considered very bright and entered the University of Chicago at age 15. Erwin recalled how his sister served as a role model to him and his brother. "I kind of emulated her in going into an education field. She became a part-time teacher." Erwin shared that his sister was a perpetual student, receiving her Ph.D. in Human Development at the same time that Erwin received his master's degree, graduating together at the University of Chicago. Erwin's younger brother Mark also attended the University of Chicago, where he received his B.A. before moving on to obtain a law degree from Northwestern University. Mark specializes in representing people with psychological disabilities. His wife is also an attorney. Erwin's brother and sister are both married and reside in the Chicago area.

Erwin grew up in the Austin area of Chicago, the far West side of the city, and went to Robert Emmet Elementary School, Austin High, and then on to the University of Illinois at Urbana-Champaign. Erwin majored in Philosophy, and then asked himself, "What was I going to do with a philosophy degree from the University of Illinois?" However, he was also in a pre-law program and had been accepted at the University of Michigan Law School. "I was already accepted to the law school when I read in *Time* magazine that the Ford foundation was funding a new program at both Harvard University and the University of Chicago to attract what they called scholar-teachers—people in the Liberal Arts and Sciences to go into teaching." Erwin decided to forego law school in favor of the new Master of Arts in Teaching program at the University of Chicago and a full-tuition fellowship that accompanied the program. Despite his father's disappointment at Erwin's decision to decline law school, Erwin became a secondary history and social studies teacher. This was one of several turning points in Erwin's career.

Erwin's love interest with his bride, Barbara (nee Robbin), of 56 years started when they met through social clubs when Erwin was a junior and Barbara a sophomore in high school. Although they were in different schools, their high schools were not far apart. After high school, Erwin enrolled at the University of Illinois and, some months later, Barbara attended the University of Wisconsin majoring in French and education. Erwin and Barbara decided being apart was not working for them, and soon after Barbara graduated from college, and a year after Erwin began his master's program at the University of Chicago, they decided to marry. As explained later, after completing his master's degree Erwin entered a Ph.D. program in comparative education, and while pursuing that program, he and Barbara started their family and began to raise their three sons, Jack, Eric, and Maury Avram (nicknamed Avi). Barbara delivered their first child, Jack, soon after she and Erwin returned from Puerto Rico, where Erwin had done his Ph.D. field work. Upon moving back to Chicago, Barbara decided to enroll in a general studies humanities M.A. program, with a concentration in French literature, at the University of Chicago. Erwin and Barbara were finally attending school, this time graduate school, together, while they were attending to their newborn first child, Jack.



Erwin and Barbara Epstein Wedding Picture, September 1961. Photo courtesy of Erwin H. Epstein.

Erwin shared that all three of their sons became lawyers and married lawyers. "I have six lawyer children." They all chose different kinds of law specialties. Jack and his wife Dena, went to the University of Missouri as undergraduates and later received their law degrees from Washington University in St. Louis. They work primarily among the Hispanic community in Chicago. Jack's practice with his clientele is entirely in Spanish. Erwin and Barbara's second son Eric also attended undergraduate work at the University of Missouri, but his law degree is

from Northwestern University. Shoshana, Eric's wife, has her law degree from Loyola University Chicago. Shoshana practices law in the fraud division of the U.S. Postal Service. They live in the Washington, DC area, where Eric is senior policy counsel in the Firearms and Explosives Division of the U.S. Bureau of Alcohol, Tobacco, Firearms and Explosives. "You can imagine how busy he must be now after what's been going on with regard to firearms in the US." Erwin shared that Eric is responsible for drafting many of the federal firearms and explosives laws. Unlike Jack and Dena, Eric and his wife Shoshana went to different law schools. Avi, the youngest son, met his wife, Eynav, while they were students at Harvard Law School. He is now the chief operating officer for Sterling Partners, a private equity firm in Chicago, while Eynav is co-owner of a legal recruiting firm in that city. Avi has his undergraduate degree from the Ohio State University, and Eynav has hers from the University of Michigan. Erwin and Barbara are blessed with nine grandchildren, four of whom are in college and the others are preparing for adulthood. They range in age from 4 to 22.



Epstein family photo at Bethesda, Maryland in January 2015. From left to right, Shoshana (Eric's wife), Eynav (Avi's wife), Erwin, Oren (Avi's son), Avi, Barbara, Alex (Eric's son), Dustin (Jack's son), Gefen (Avi's son), Gabriela (Eric's daughter), Naomi (Avi's daughter), Jered (Jack's son), Dena (Jack's wife), Kayla (Jack's daughter), Jack, Eric and Aaron (Eric's son). Photo courtesy of Erwin H. Epstein.

Career and Charting a Course in CIE

When Erwin was a master's student at the University of Chicago, he passed a sign in a hallway that aroused his curiosity, "Comparative Education Center." He went in to find out what that was all about, and, after looking at his academic record, C. Arnold Anderson, the Center director, offered him a fellowship. And so Erwin's pursuit of the field began.

Some years ago, Erwin co-authored a paper published in the *Comparative Education Review* that stated that only about a third of the members in the Comparative and International Education Society received a degree in Comparative Education (Cook, Hite, & Epstein 2004). "Most have gotten their degrees outside of the field—mostly in Sociology, Economics, Political Science, and other Social Science areas as well as in the Humanities and education—

and then came into the field afterwards. I came into the field at the very beginning as a PhD student. That's how I really got into the field." Erwin joined the Comparative and International Education Society in 1962 and has continued active membership ever since.

Erwin expressed how the growth and strengthening of CIE within the US came gradually, with relatively few entering the field before the 1970s. Early on practically all of the Americans that were in the field came from the Peace Corps. "Things are much different today. I think it's because of globalization," Erwin noted. He recognized that it is not uncommon for undergraduate students to go abroad, to spend a semester or a year or a few months studying abroad. This exposure to foreign cultures, languages and other people has become common. It's natural that people who are interested in education wish to connect their interest in education with their experiences abroad. He explained how he thinks that "more than anything else, that's what has created the stimulus for growth in the field. If you're interested in education and you're interested in international work and foreign cultures, it's a natural marriage between the two interests." It is a matter of being exposed to people and places abroad."

Erwin shared his interest in and knowledge of CIE when he taught for two years in Mexico at the Universidad de Monterrey. His research in that country as well as in Peru and St. Lucia exposed many to the field in those countries.

Erwin maintained that some great opportunities for work and study in CIE fall outside of academia, such as at UNESCO, the World Bank, and at many international organizations (private, public, and governmental). Indeed, opportunities are strong in academia generally, and CIE has grown within interdisciplinary fields outside of education (see Jacob 2015). Erwin believes that globalization has contributed to the growing interest in CIE, with the need to understand other people and other cultures becoming paramount. These are among the major factors Erwin recognizes as to why people continue to pursue CIE in their studies and careers.

Erwin recognizes the many challenges which exist within education, including in CIE: "I think the greatest challenge to CIE is financial. Actually, it's a challenge to all of education." Higher education is generally funded by the dominant areas of medicine, business, and law (see Jacob and Gokbel 2018). What happens is many wealthy people tend to have obtained degrees in non-education-professional fields and feel a sense of responsibility to give back. "What do they give back to? They give back to their own field. They feel they gained their advantage in the world by having pursued programs in medicine, law, or business." What Erwin expressed is they don't give back to the college overall but give back to the fields in which they emerged, in which they received their graduate education. "Education as a field of study does not generally lead to careers that offer a great deal of wealth. People will come out of education, they don't have the resources to be able to give back to their field, as people who have emerged from medicine, law, or business are able to do. I think that's the biggest challenge" Erwin laments.

Erwin explained how education is generally underfunded and CIE—as part of education—is also underfunded. It's more difficult to get government grants in that field than in many other fields. Erwin also mentioned the payoff from giving to education is very large in a general sense, but the payoff is not immediate. The payoff in medicine, law, and business, is much more immediate, and that influences the choices of governments and private foundations to support disproportionately those areas.

In Erwin's view, the 1950s and the 1960s were pivotal in the development of the field. That's when a fairly large number of comparative education societies across the world had been formed. The people who were pivotal and most influential in the United States included

William Brickman, who would be top of a list of prominent CIE figures and who was the co-founder of the Comparative [and International] Education Society (Epstein 2016). He co-founded the organization with Gerald Read and George Bereday. In Europe, Joseph Lauwerys, Brian Holmes, Edmund King, and Michel Debeauvais were key CIE pioneers. In Asia, Mark Bray, Masunori Hiratsuka, Tetsuya Kobayashi and Gu Mingyuan played significant pioneering roles. These individuals helped to develop CIE, and their legacies remain significant.

Impact on the CIE Field

Erwin has been an exceptional CIE contributor and inspired many to continue the legacy for improving education. He served as President of the World Council of Comparative Education Societies (WCCES: 1980-1983), President of the Comparative and International Education Society (1981), as well as Editor of the *Comparative Education Review* (1988-1998). Erwin states how “If you read my chapter (Epstein 2007) in the book, *Common Interests, Uncommon Goals* (Masemann, Bray & Manzon 2007) about the development of the World Council of Comparative Education Societies, you would see that there was an incident when I became president of that organization that I think stands out.”

Erwin was troubled deeply when he learned that a scholar from Taiwan was disallowed from presenting his paper at the 1980 Fourth World Congress of the WCCES, held in Tokyo, when Erwin was elected WCCES President. The scholar informed Erwin that he was unable to present his paper because of a UNESCO protocol relating to the United Nations’ refusal to recognize Taiwan as a member country. The Congress organizers had interpreted partial UNESCO sponsorship of the Congress to mean that scholars from countries not recognized by the UN were to be disallowed from presenting their work. Once Erwin learned of this incident he took a stand, “I simply cannot be President of an organization that disallows bona fide scholars from giving papers, I simply won’t abide that.”

It created enormous attention because there was nobody else who was willing to take the leadership role of WCCES President at that time. Erwin met with the WCCES Executive Committee and a compromise was made that the UNESCO protocol would be honored at that time in the 1980 World Congress, but that the WCCES Constitution would be amended to ensure that no bona fide scholar would be prevented from participation for non-academic reasons at future World Congresses. This practice remains current within the WCCES Constitution to this day.

With that compromise, Erwin decided to assume the WCCES presidency, and the rest is history. That had an impact on the field and was prominent in Erwin’s career. As editor of the *Comparative Education Review*, he enacted very strict protocols about how a rigorous peer review process would be instituted, including double-blind reviews, and the whole system would be on an objective basis. There would be no favoritism whatsoever; only academic merit would determine acceptance of manuscripts for publication, except for the annual CIES presidential addresses, which by tradition were always to be included.

Erwin is well known for his scholarship on the history and theory in CIE. “I would say that my work as President of the World Council, President of the CIES, and Editor of the *Comparative Education Review* would be areas where I think I’ve had the most impact.” His writings on how the CIE field developed and its origins have had a good number of citations and impact on other scholars and practitioners.

Erwin’s most recent article, entitled “The Nazi Seizure of the *International Education Review*,” analyzes the 1930s rise of that pioneering journal and its post-war rebirth as the *International Review of Education*. “The article describes the fascinating history of that journal’s origins as

it was edited by Friedrich Schneider of Germany and co-edited by Paul Monroe of Columbia University in the US.” Erwin shares how the journal had a prominent start but within three or four years was seized by Alfred Bäumler, a virulent anti-semitic dedicated to carrying out the Nazi plan (Epstein 2018).

Erwin has said that his “work on epistemology in comparative education has been the most impactful. My work on Latin America also has had some impact.” Erwin was recently invited to present his work on Latin America as a featured speaker in the Canary Islands of Spain.

Erwin talked much about the great benefits of CIE scholarship, but also pointed out weaknesses that exist in the field. Erwin gave as an example his review many years ago of a book, *The Children of the Revolution*, by the renowned author, Jonathan Kozol. In that review, Erwin showed that Kozol gave an egregiously misinformed analysis of Cuban education, reflecting a clear ignorance of proper scholarly procedures of which all well-prepared comparativists are aware.



Erwin and Barbara Epstein with several Loyola University Chicago CIE students (and a few family members) at his retirement party, May 2012. Photo courtesy of Erwin H. Epstein.

In contemplating what he has done and continues to do in retirement, Erwin shared the following:

I recently saw an interview in the *Wall Street Journal* of Sasha Cole, who had been a silver medalist in a previous Olympics. She talked about how difficult retirement was from the Olympics and from being a featured ice skater—from no longer being in the spotlight as a nationally- and internationally-known skater—and to adjust to living a kind of different life. My experience is completely the opposite. I retired six years ago and I don’t think I’ve ever been more productive. I miss teaching to be sure. In terms of scholarly work and the work that I’ve done with the people in the field in so many different places, that has continued. I just had articles published in a couple of prominent journals. I recently edited a book in the field, and I’m editing another book, this time on 20th century notable figures in Comparative Education. Retirement has been very good to me. I’ll leave it at that.

Erwin has been a Fulbright Professor in Mexico and has also lectured on CIE at universities in Argentina, Chile, Colombia, Cuba, Germany, Nicaragua, Peru, Russia, South Africa, Spain, and Taiwan. His research focuses on a sense of nationality among schoolchildren in socioeconomically marginalized communities, school choice, education and democratization, and comparative theory. Professor Epstein has served the CIES in many capacities, including most recently as its Historian from 2008-2015. As Editor of the *Comparative Education Review*, he issued more editions of that journal than any other Editor in the journal’s history before him. Erwin originated the “Filter-Effect Theory of Education” to explain the impact of schools on school children in marginalized communities. Although primarily a Latin Americanist and epistemologist, he has also published works that range from the impact of parasitic diseases on schoolchildren’s achievement to higher education in Mainland China and Taiwan. He directed the Comparative and International Education Course Archive Project (CIECAP) and founded and co-directed the Joint Centers for Comparative Law and Education,

which focuses on the legal right of children to an education, at Loyola University Chicago. Throughout most of his illustrious university career, he taught the introductory course to comparative education, comparative theory, comparative perspectives on education and democratization, but also sociology.

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Ms. Stacy Taylor is a former 20-year US History Teacher in West Tennessee. She has written social studies curriculums for Tennessee, as well as, served on the Advisory Board for Social Studies Standards, West Tennessee Historic Commission, Germantown Historic Commission, and the Collierville Education Society. Currently, Stacy is working on her Ed.D. in Leadership and Policy Studies at the University of Memphis with a particular focus on neuro-education; and, but not limited to, advisor in Southern History in the South. When not researching new historical documents and policies she does some part-time acting. She has been in five major motion pictures and helped serve as a historian for several. Additionally, in her free time, she enjoys photography and visual arts oil painting. Stacy is very involved with her family and enjoys the everyday pleasures of her grandchildren. She is a new resident in Boulder, Colorado and a member of the Colorado Mountain Climbers Club. Stacy is a graduate of University of Memphis and received her M.Ed. in Curriculum and Instruction from Union University with honors.

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Appendix: Letter of Erwin H. Epstein to Mary Jean Bowman, 14 December 1990



Comparative Education Review

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December 14, 1990

Dr. Mary Jean Bowman
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Dear Jean:

So you thought the brief resume I sent you was too formal. To be sure, we academicians are a notoriously vain lot, but some of us cringe at the thought of writing a personal autobiographical sketch. A resume, at least, is impersonal — its character conveys a distance, a shield, between the subject and her/his life story.

But you insist on my setting pen to paper to say what I've done and, really, who I am. This is something I've never done before! Put me in front of a computer and let my fingers do a familiar jig on the keyboard to turn out a full-scale research report or to write a painful letter to a would-be *Review* author — those would come easier than satisfying your request. You want me to recall half-forgotten, deeply personal memories: Only to honor my mentor, C. Arnold, would I do that!

Well, where do I begin? Would a modified chronology do? I could say that however much I have lived, worked and traveled outside Chicago, that city and the University of have been at the center of my personal universe. Consider that I was born, raised, schooled (except for my undergraduate stint at the U. of Illinois at Urbana), met my wife, married, and saw the birth of my first son there. And now my eldest two sons (one a lawyer, the other in law school at Northwestern — the youngest is a senior in high school and still in our house) are living there — as are virtually my entire extended family (brother, sister, aunts, uncles, nephews, niece). Those ties keep me ever in close social touch, while the *Review's* publisher, the University of Chicago Press, makes sure that I am never distant professionally from the city and the university.

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Chicago made me both provincial and worldly. So much of my childhood and early adulthood is wrapped up in that city and its state that before I entered graduate school at Chicago I had never spent more than a month outside Illinois and had never been on an airplane! Consider what a contrast that is to others trained in the Comparative Education Center, most of whom were either veterans of the Peace Corps or for other reasons had lived abroad. Having barely been outside the borders of Illinois, I came to the Center with neither foreign area nor foreign language experience (beyond a couple of desultory high school years of Latin and another couple of undergraduate years of basic Spanish); yet I daringly set out to become a Latin Americanist. I think back to that experience with amusement and a little pain whenever people ask me about the courses I taught in Spanish at the Universidad de Monterrey and the Universidad LaSalle in Mexico, or the research and speeches I presented in that language in Argentina, Chile, Colombia, Peru and Puerto Rico, or the workshop in Portuguese that I gave at the Universidade Federal do Pará in Brazil.

The University of Chicago was a large part of my life even before I entered. My sister, the eldest of three siblings, had gone to the university on full scholarship as a prodigy at age 15 (and then gained the first of our aggregate six academic degrees there), and I was in awe of the institution. I remember the late winter day in 1956 when five of the best students and I from Austin High, a tough west-side school, drove all the way to Hyde Park to take the Chicago admissions exam, after which we were to be entertained and shown around at the university. Our instructions said to "take pen and ink" to the exam, which I thought odd, since even at that antediluvian time everyone used a ball point pen. Ever obedient, I followed the instructions, put ink and fountain pen in a paper bag, and dressed up in my best shirt and light-colored pants. My high school associates, being less awed than I, ignored the instructions and made fun of my naïveté.

This is a story in which they who laughed first also laughed last. As I sat cramped with two others in the back of an old car, the black ink leaked through the bag and on to my light-colored pants, whereupon mortification set in. It was too late to go back and there was no way out. Fortunately (perhaps), the tallest fellow in the group (I was the shortest) wore a hefty trenchcoat and offered, out of pity and amusement, to loan it to me as a cover. I had no choice but to accept his kind(?) offer. The coat was so large that I had to hold up my arms to keep the sleeves from draping over my fingertips, and to take broad, slow steps to prevent walking on the coat bottom.

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As we arrived at the test site, an overheated hangar, a proctor, upon passing out the test pencils (of course!), urged me to remove my coat, to which I replied, hardly convincingly, that I was cold. I spent my first official three hours at the University of Chicago writing through sweat, tears, and draping sleeves, and the next three hours looking like a Madison Street bag man in the institution's most hallowed halls and in the company of its most esteemed leaders. Where was Arnold when I needed him then? Miraculously I did well enough on the exam to qualify for admission, but the trauma of the experience and the cost of the tuition made me favor the University of Illinois.

After Illinois I was set to go to law school at the University of Michigan when I read about a revolutionary new program to convert a select group of about 60 high-quality liberal arts and sciences majors into high-school "scholar teachers," and give them full-tuition fellowships at the University of Chicago. This was to be the first class of Chicago's two-year pioneering M.A.T. program. By then the memory of the earlier experience had faded, and I decided to apply and take the graduate admissions exam. This time I ignored all written instructions about exam-taking tools and was awarded a fellowship. Near the completion of the program (only three of us finished on schedule), I became interested in the Comparative Education Center and was offered a Ford Fellowship to pursue a Ph.D. program. However parochial my corpus of experiences, I had an excellent liberal studies background and was excited about the prospect of international study.

Finishing the Ph.D. and leaving Chicago turned out to be a major break with the past. Until that time — with the exception of a half-year of doctoral field work in Puerto Rico — my life was lived almost exclusively in Illinois, and I went off to take the first of several positions outside the area and become an international expert and traveler.

Of course, I have not spent all of the time as an internationalist. For the past 20 years I have been a professor of sociology. For eight of those years I did administrative work, having been chair of a sociology department and chair of a social sciences division. But mostly my profession has brought me to the far reaches of the world. I have taught in Wisconsin, Nebraska, Texas and Missouri; have worked in Puerto Rico, Peru, St. Lucia, Mexico, Panama, Argentina, Chile, Colombia, Taiwan and South Africa; and have conducted documentary research on Cuba (for which I was awarded the Lourdes Casal Prize).

It has, for the most part, been a very good ride for this inner-city product. On some excursions I have even been accorded the status of dignitary, as during my first visit, when I was President of the World Council of Comparative Education Societies, to Taiwan. On that occasion I was furnished a chauffeur-driven limousine (the kind with little flags on the front fenders) for travel in Taipei, and was taken by the Secretary of Education for Taipei and the President of National Taiwan Normal University and their families for a trip around the island that included spending a night in Chiang Kai-shek's private lodge (where I was given his room and bed). On another occasion, when I was advisor to Chile's Minister of Education, the ministry gave a luncheon in my honor in the minister's private banquet hall, to which the country's leading university presidents were invited, and those presidents in turn gave luncheons in my behalf at their universities. In Argentina, the Academy of Education, consisting of the Minister of Education and the nation's leading University Presidents, invited me to give a private lecture on university accreditation, and the country's most prominent newspaper interviewed me about my views on the nation's educational future. Recently, the Comparative Education Society of Europe shortened its biennial congress in Spain a half day to accommodate my Sabbath preference, thus allowing me to close the week-long program with the Joseph Lauwerys Memorial Address.

Not all of my experiences have been so sublime. I can remember taking a 23-hour ride through the world's driest desert in a Peruvian bus so cramped that people sat on tiny stools in the aisle, and with so little air that we had periodically to put our 18-month old's head out the window to breathe. I remember the time in Puerto Rico when my survey took me to a school in a housing project area where the kids flooded the street to conceal an uncovered manhole, whereupon my car fell in, breaking the differential and almost my back. And, I remember days of collecting stool samples in sweltering heat from schoolchildren in St. Lucia for transport in my little Volkswagon bug as part of my study on parasitic diseases and academic achievement.

I give much credit in all of this to my family, and especially to my wife, Barbara, for having the fortitude to put up with what I've dragged her and the boys through. Barbara has had to suffer two "M" sicknesses — mountain sickness ("saroche") when living 13,000 feet in the Peruvian altiplano — and morning sickness in Puerto Rico, Peru and Mexico — and was almost mortally stricken with food poisoning in the latter country. Each boy has had his share of experiences. Jack, the eldest, was, as a toddler, almost carried off by an Andean condor; Eric, as an infant, woke up one morning in St. Lucia with dozens of mysterious red marks on his tiny face that turned out to be bites from mosquitos which had bred in a drain near his bed; and Avi was thrown into first grade as the only non-Spanish-speaking child in an all-Spanish-language Mexican school (and yet achieved the highest grades in his class!).

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You've asked me to write this at a difficult time — difficult because I'm having to conjure up memories at the end of the second most painful year of my life. It happens to be the final week of a year-long period of mourning for my father's passing, and there was also the loss of Arnold, my mentor. (The most painful year was two decades ago when my mother died and I was concurrently having a nasty career conflict.) Yet I find the exercise somewhat of a cathartic, and I'm grateful to you for pressing me to do it.

I'll finish up by saying that professionally my most satisfying experiences have been to serve as President of the World Council of Comparative Education Societies, President of the Comparative and International Education Society, and now as Editor of the *Comparative Education Review*. I have in the latter position been especially privileged to work with the best people in our field. Consistent with that thought, Jean, I'll conclude by asking you to give me your evaluation of the enclosed manuscript, which was submitted for consideration to the *Review*.

With all best wishes,

A handwritten signature in cursive script, appearing to read 'Erwin H. Epstein', written in dark ink.

Erwin H. Epstein

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Profile of a comparative and international education leader: Vandra Lea Masemann

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This is a profile of comparative and international education leader Vandra Lea Masemann. It provides a brief biographical background of her upbringing and education in England and Canada while also documenting her notable career as an educator, advocate for comparative and international education, and leader for gender equality in education. This article is based on multiple data gathering and analysis techniques, including oral interviews, discourse analysis, and archival analysis. The article provides a selection of Vandra's significant family and career milestones, an overview of the remarkable influence she has had on the comparative and international education field, and her perspectives for those considering a career in this field.

Keywords: Vandra Lea Masemann, Comparative and International Education, Leadership, Gender, Anthropology

نبذة عن أحد قادة التعليم المقارن والدولي:

فاندرا ليا ماسيمان

هذه لمحة عن أحد قادة التعليم المقارن والدولي فاندرا ليا ماسيمان. وهي تعطي خلفية موجزة عن نشأتها وتعليمها في إنجلترا وكندا، كما أنها توثق مسيرتها البارزة كمعلمة تدافع عن التعليم المقارن والدولي، وقائدة للمساواة بين الجنسين في التعليم. يعتمد هذا المقال على تقنيات جمع وتحليل البيانات المتعددة، بما في ذلك المقابلات الشفوية وتحليل الخطابات وتحليل الأرشيف. يقدم المقال مجموعة مختارة من معالم فاندرا العائلية والمهنية المهمة، ونظرة عامة على التأثير الملحوظ الذي تتمتع به في مجال التعليم المقارن والدولي، ووجهات نظرها لأولئك الذين يفكرون في مهنة في هذا المجال.

国际比较教育先锋人物简介：万达·利·梅思曼

作为一篇国际比较教育先锋人物的简介，本文简叙了万达·利·梅思曼在英国和加拿大成长和受教育的背景，描述了她作为教育者的辉煌职业生涯。她曾有力地支持国际比较教育的发展，并引领教育中的性别平等。本文采用了多种数据收集和数据分析的方法，包括口述访谈法、话语分析法和档案分析法。本文分析了万达的家庭和职业中的代表性事件，综述了她对国际比较教育领域的深刻影响，以及她的重要观点与视角。希望能够为在此领域发展的人们提供参考与启发。

Profil d'un leader de l'éducation comparée et internationale: Vandra Lea Masemann

Ceci est un profil du leader de l'éducation comparée et internationale, Vandra Lea Masemann. Il fournit une brève biographie de sa formation et de son éducation en Angleterre et au Canada, tout en documentant sa carrière exceptionnelle en tant qu'éducatrice et défendant l'éducation comparée et internationale et l'égalité des sexes en éducation. Cet article est basé sur de multiples techniques

de collecte et d'analyse de données, y compris des entretiens oraux, des analyses de discours et des analyses d'archives. L'article présente une sélection des étapes marquantes de la famille et de la carrière de Vandra, un aperçu de l'influence remarquable qu'elle a eu dans le domaine de l'éducation comparée et internationale, et ses visions pour ceux/celles qui envisagent une carrière dans ce domaine.

Краткий биографический очерк лидера в сравнительном и международном образовании: Вандра Леа Мейсманн

Данный краткий биографический очерк рассказывает о лидере в сравнительном и международном образовании Вандры Леи Мейсманн. В нем дается краткая биографическая справка о ее воспитании и образовании в Англии и Канаде, а также документируется ее выдающаяся карьера в качестве педагога, защитника сравнительного и международного образования и лидера по вопросам гендерного равенства в образовании. Эта статья основана на нескольких методах сбора и анализа данных, включая устные интервью, анализ дискурса и архивный анализ. В статье представлен ряд значимых семейных и карьерных вех Вандры, обзор ее значительного влияния на сравнительное и международное образование, а также ее рекомендации для тех, кто рассматривает карьеру в этой области.

Perfil de un líder en educación internacional comparada: Vandra Lea Masemann

Este es el perfil de la líder en educación internacional comparada, Vandra Lea Masemann. Presenta un breve trasfondo biográfico de su educación y crianza en Inglaterra y Canadá, mientras que documenta su notable carrera como educadora, defensora de la educación internacional comparada y líder de la igualdad de género en la educación. Este artículo se sustenta en múltiples técnicas de recopilación y análisis de datos, que incluyen entrevistas orales, análisis del discurso y análisis de archivo. El artículo proporciona una selección de los hitos importantes tanto familiares como profesionales de Vandra, una descripción de la notable influencia que ha tenido en el campo de la educación internacional comparada, y sus perspectivas para quienes consideran una carrera en este sector.

Biographical Background in England, Canada, and Africa

Anthropologist and distinguished advocate for comparative and international education, Vandra Lea (Ward) Masemann, had crossed the Atlantic Ocean three times by the age of nine as her parents tried to decide whether England or Canada was the best place to live. Born in England in December 1944 during World War II, Vandra spent the first four years of her life in England before her parents, Claire Higgins and Arthur Ward, made the decision to immigrate to Canada. After spending four years in Canada, the Wards moved back to England in 1953. But then in 1954 when Vandra was nine, they returned to Canada. Vandra and her sister, Kirsten, who was 14 months younger than Vandra, enjoyed living in both countries. From a comparative education perspective, Vandra and Kirsten began the process of learning to write, to understand arithmetic, and of appreciating the history relevant to both countries of their residence. These perspectives set in motion a future international educational career many years before Vandra entered a classroom as a teacher.

From 1972 until the present, Vandra's career has included numerous higher education teaching opportunities throughout Canada and the United States. However, it was her first teaching experience at the Accra Girls' Secondary School, in Accra, Ghana from 1967 until 1969 when she was a volunteer with the Canadian University Service Overseas (CUSO) organization coupled with her parents' influence that had the greatest impact on her decision to become an educator. Vandra's parents were very instrumental in Vandra's desire to pursue higher levels of education. They were married in 1938 in London, England, and had a deep work ethic, a passion for education, and a love for their fellow man. Claire Higgins was born in Canada but had moved with her family to England in 1931 during the Great Depression. As was common

for working class children, she was made to stop school at 14 and started clerical work in a branch of the Royal Arsenal Cooperative Society (RACS), where she met her future husband, Arthur, who was English. The Wards had a strong work ethic, a belief in socialism and pacifism, and a conviction that they were insufficiently educated. They made sure their daughters understood the imperative for higher education, and in fact this was one of the reasons to settle in Canada. Vandra's father, Arthur, was born in 1911 and had both diphtheria and rheumatic fever as a child, which caused long absences from primary school. At 14, the school-leaving age, he has also started work at the "Co-op". Before the couple married, Arthur had won money in the *Irish Sweepstakes* and used the funds to purchase a brand-new house. They lived in the area of Southeast London during World War II where many bombs targeted the Thames River docks. They both worked for the Civil Defense to rehouse people who had been bombed out during the war or to clear rubble and mend blown-out windows.



Vandra's father, Arthur, Vandra, her sister Kirsten, and mother, Claire, just before they immigrated to Canada in 1949. Photo courtesy of Vandra Masemann.

When the Wards moved their young family to Canada, Arthur accepted a position working in the warehouse of Simpson's department store in Toronto on the basis of his previous experience at the "Co-op" in England. He felt this job was beneath him and after some years he was promoted through various levels and eventually retired as Chairman of the Branch Buying Committee. Although he was respected for his work in the retail business, he regretted that he had never become a teacher. As for Claire, she realized that she did not have enough education and in bookkeeping courses in order to get office jobs. Later she worked for non-profit organizations (the United Nations High Commissioner for Refugees, the Canadian Association for Adult Education, the United Nations Association in Canada), and was instrumental in organizing World Refugee Year in Canada.

Throughout Vandra's growing up years, there were ongoing themes in the Ward household: the value of education, the importance of having a global perspective, and the duty to serve one's community. Because Arthur monetarily supported the office of the African National Congress in Toronto while Nelson Mandela was imprisoned, he received a letter of thanks for his support. In addition, he helped set up a recycling center and was a member of the horticultural society in the suburban area where they lived in Canada. Vandra's parents went on to have an active volunteer life and were very internationally education-minded. They sold UNICEF cards and raised over CAD\$250,000 (over US\$300,000 at the time) in funds for UNICEF, receiving a volunteer award from the Ontario government. Additionally, they packed Christmas hampers for an Anglican church in downtown Toronto each year.

The comparative perspective of Vandra's life started early. When she first learned to speak, she had an English accent. However, she had acquired a Canadian accent by the time she entered school. She learned that each country had a different word for the same thing; i.e., sidewalks in England were called pavements and gasoline in England was called petrol. Vandra's early memories of family discussions included those with relatives about whether it was better to live in one place or another. When Vandra was 15 years old, she was granted Canadian citizenship along with Kirsten and Arthur. Understanding that she had been born in England but also having Canadian experiences, Vandra says, "Our life in England laid a permanent template about how we thought about things ... and we were very aware of having crossed the ocean."

Vandra's high school years included two events that would influence her future career and her future family plans. As for her future career, it was during this time that Vandra's father took his daughters to a series of lectures at the University of Toronto held on Saturday nights during the winter months. Organized by the Royal Canadian Institute for the purpose of public education, these lectures included invited scholars from all over the world to talk about their research. When Vandra was in grade twelve, an anthropologist by the name of Colin Turnbull gave a presentation about his new book, "The Forest People," which was about the Mbuti Pygmies of the Ituri Rainforest in the then-Belgian Congo. It was on this night Vandra decided to become an anthropologist because she related the lecture to the questions that she had pondered about why human beings behave similarly when they are in groups or why children at the different schools she had attended knew to act in a similar way. As for her future family plans, it was when she was in grade ten that Vandra met her future husband, Volker, and admired later his German accent in reading the prose passages in class.

Having made the decision about her future career aspirations, Vandra began the process of planning her post-secondary career during her last year of high school. She consulted the University of Toronto course catalog and located the list of anthropology classes. She not only chose the list of classes for the first year at the university, she also organized the list of classes that she would take for the next four years. Vandra graduated from high school where she ranked third out of her class of 330 students. Vandra and her mother, Claire, were enrolled in university at the same time. Vandra graduated from the University of Toronto in 1966 with a Bachelor of Arts degree in Anthropology. She got an MA in Social Anthropology in 1967 and a PhD in Social Anthropology in 1972. Meanwhile, Claire was attending university one course at a time. It took 14 years for her to graduate, and she received her BA in 1973. Present at the ceremony were her two pregnant daughters and her first grand-child, Vandra's daughter Charlotte. Symbolizing this moment for the family, the picture of Claire in her university graduation regalia was placed on the altar at Claire's funeral.

Vandra's parents had the satisfaction of producing two highly-educated daughters. Kirsten graduated valedictorian of her high school class and decided to major in Psychology at the university. Unlike Vandra who was interested in why people behave in a certain way because of their surroundings, Kirsten was more interested in why people behave the way they do because of what was contained in their brain. Kirsten first got a degree in Psychology and worked as a School Psychologist, but later she took a medical degree and worked for 30 years as a Family Physician with an ongoing interest in mental health.

After completing her MA, Vandra and Volker Masemann (married in 1966) decided to teach in Africa with the Canadian University Services Overseas (CUSO), a voluntary organization similar to the US Peace Corps. They chose to volunteer in Africa for two reasons. The first reason was the aforementioned Colin Turnbull lecture and the second reason was because of the blue airmail envelopes from Nigeria her parents had received from an English friend who had moved to Nigeria to become a Classics Professor.

They were unable to be placed in Nigeria, however, because of the Biafran Civil War. Instead, they spent two years from 1967-1969 teaching at Accra Girls' Secondary School in Ghana. Trying to make a decision about a new thesis topic, Vandra wrote a letter to her advisor who replied with advice that she develop an ethnography of the girls' boarding school. Her decision to change her thesis topic was based on that one letter. Unable to have access to large amounts of current global literature, Vandra's thesis work was based largely on Phillip Foster's book, *Education and Social Change in Ghana*, which Vandra had purchased in the university bookstore in Accra. As she gathered her data for the ethnography, her work to complete her

thesis included writing field notes in school exercise books, giving questionnaires to all the students at the boarding school, and collecting many types of ethnographic material.

Prior to leaving for Africa with CUSO, Vandra had enrolled in a Master of Philosophy program because there was the belief that there would be a high need for academic professors in teaching positions rather than researchers. When she returned from Africa, Vandra's advisor informed her that she had enough material for a Ph.D. At that point, Vandra changed her registration, commenced her coursework, and completed her PhD coursework, which included her first education course. As she began writing her thesis, Vandra and Volker decided that it would be a good time to have their first child. At only 27 years of age and with Charlotte only 13 months old, Vandra defended her thesis on 23 June 1972. It was entitled "Motivation and Aspirations in a West African Girls' Boarding School." C. Arnold Anderson, a notable figure in comparative education, was present as the external examiner for her defense.

Vandra and Volker's family grew to seven members as five daughters were born over the course of 12 years as Vandra's career in education continued to flourish. With her love for education and the understanding that the child must develop within herself, Vandra sought to enroll each of her daughters in a Montessori school. She and Volker also encouraged each daughter to study abroad in Germany and France, becoming fluent in French, and German. More specific details of their daughters' lives are given here.

Vandra and Volker welcomed their first daughter, Charlotte, into their family in 1971. After completing Montessori school in Madison Wisconsin and Toronto, and high school at the University of Toronto Schools, originally founded as the university's model school. Charlotte enrolled at McGill where she majored in the classics and then went on to Harvard and studied medieval history. Eventually, Charlotte transferred back to University of Toronto and received her Ph.D. in mediaeval agricultural economics. She teaches part-time at Carleton University. Charlotte and her husband Erik, whom she met while on exchange in Germany, have three children.



Vandra in the Department of Educational Policy Studies at the University of Wisconsin-Madison in the mid-1970s. Photo courtesy of Vandra Masemann.

Vandra and Volker's second child is Alison, who was born in 1973 while Vandra was at the Ontario Institute for Studies in Education (OISE). Alison also went to Montessori schools, first in Madison, Wisconsin while Vandra was employed at the University of Wisconsin (1975-1978) then in Toronto. She also graduated from the University of Toronto Schools. Alison attended Queen's University where she majored in Political Science and Sociology; she later attended Ryerson University where she graduated with a degree in Journalism. She is employed as a Current Affairs radio producer at CBC Radio in Canada, and her mother proudly listens to Alison's broadcast every morning. Alison and her husband, Jeff, who is also a journalist, have three children.

During the Wisconsin years, the couple's third daughter, Hilary, was born in Toronto in the 1977 summer break. Volker stayed home with the children and also attended doctoral courses in engineering at the University of Wisconsin. Like her sisters, Hilary went to a Montessori school, this one located on the Toronto Islands where she developed a great love of nature and the arts. She then attended the University of Toronto Schools. In 1995, the Masemann family had moved to Florida as Vandra had accepted a teaching position at the Florida State University. After high school graduation, Hilary enrolled at the University of Toronto where she graduated with a double major in German Language and African History. Hilary then went

to Sheridan College in Oakville Ontario in the Ceramics and Design program. After six years as a potter, she decided to go back to school to major in Education and enrolled at the Ontario Institute for Studies in Education (OISE) where she followed the global education track. Since graduation from OISE, Hilary has taught History, English, and Visual Arts at various high schools in Toronto. Currently, she is an art teacher in a very culturally diverse school filled with academically-prepared students. Hilary has had a stellar career as a teacher and has received recognition for her work. She is married to Voytek, has two step-sons, and is expecting her first child in the summer of 2018.

In 1983, Vandra and Volker welcomed twin daughters, Bronwen and Rosemary. Following the same path as their sisters, Bronwen and Rosemary attended the Montessori school and then the local public school. In 1995 as the family was residing in Florida, Bronwen and Rosemary attended the local public school for a short time, but after finding it very authoritarian they were enrolled in an alternative Krishnamurti school (named after an Indian guru) and then in the International Baccalaureate (IB) program in Florida. It was during this time the family made the decision to move back to Toronto. Upon arriving back in Toronto, Bronwen and Rosemary enrolled at and graduated from the University of Toronto Schools.

Like their three older sisters and with the encouragement of their parents, the twins continued their education. Bronwen majored in the history program at University of Toronto and received a master's degree in History from McGill University in Montreal. Wanting to combine her interest in books, history and communication, Bronwen decided to attend the library school at University of Toronto, was awarded a degree in Information Science and is currently employed at The Information School at the University of Wisconsin. Bronwen and her husband, John, who is a philosophy professor, reside in Wisconsin, have one child, and are expecting their second child.

Rosemary obtained a Bachelor of Humanities degree from Carleton University, and then went on to law school at McGill University, where she graduated with a Bachelor of Civil Law and a Bachelor of Common Law. After doing her training/articling year at the Ministry of the Attorney General for Ontario – Office of the Children's Lawyer, she worked advocating for children at a legal aid clinic and doing legal research. Recently she opened her own law practice in Toronto, practicing family law and child protection law. She lives with her fiancé, Graham, in Toronto.

Vandra's husband, Volker, is a civil engineer and has spent his entire professional career designing large volume wastewater treatment plants all along the shores of Lake Ontario. His undergraduate and graduate degrees are from the University of Toronto. However, it is his work mentoring future engineers, his push to employ women and minorities in male-dominated career pathways, his influence on his daughters, and his appreciation for global education that will leave his mark on future generations.

As Vandra says, "We have always been a family with a global outlook, fairly left-wing views, and we see education as not just a pathway for elitism but doing something for the world." Each of Vandra and Volker's daughters in her own way teaches and makes an educational impact in her respective community.

Career and Pathway Discoveries in CIE

In 1972 as a new mother, experienced CUSO volunteer in Africa, and developing anthropologist, Vandra found herself at a crossroads in her life. As she was preparing to defend her thesis in the spring of 1972, Vandra's thesis supervisor relayed a message from the Sociology Department at the Ontario Institute for Studies in Education (OISE) requesting applicant recommendations for an Adolescent Socialization teaching position. One week after she defended her thesis, Vandra started her teaching career and would be in the classroom during the fall of 1972. Thus began her professional career in education.

Her research at the girls' secondary school in Ghana was the basis for her first comparative and international education focused article, "The 'Hidden Curriculum' of a West African Girls' Secondary School" published in the *Canadian Journal of African Studies* in 1974. In this article, Vandra sought to define the lessons students were learning apart from the requirements stated in the West African Examination Council syllabus (Masemann, 1974, p. 481). She found that the students were not only learning the required curriculum but also lessons that contributed to the students' knowledge of power, autonomy, and the possibility of a release from manual labor in their roles as wives and employees (p. 494). Relating her findings to how the students valued education, Vandra broke down the "hidden curriculum" into four areas: spatial arrangement of the school location, temporal sequence of events, the school as a bureaucratic organization, and the teacher as a role model. In the drafting this article, Vandra developed a deep interest in the invisible curriculum, not only in Africa but also in North America.

While in Canada and during her third year of teaching at OISE, Vandra was invited to be on a panel at the 1975 Comparative International Education Society Conference in San Francisco. The invitation was from Matthew Zachariah from the University of Calgary (and future CIES President), who was organizing a panel to discuss the different methodologies in comparative education. Professor Zachariah needed a speaker on the panel that could speak from an anthropological perspective. This invitation was the event that launched Vandra's career in comparative and international education.

As a result of her participation on the CIES panel, Vandra received an invitation from Andreas Kazamias to apply for a tenure-track position at the University of Wisconsin. The University of Wisconsin was seeking an anthropologist who could teach qualitative field methods, a teacher that could bring an ethnographic approach to the study of comparative education, and a teacher that could inject the cultural analysis to the foundational courses for the undergraduate students. As a result of accepting this invitation, Vandra taught Anthropology of Education courses to undergraduates and graduate students at University of Wisconsin for several years. Soon after taking up this position, Vandra wrote the article, "Anthropological Approaches to Comparative Education," which was published in the October 1976 edition of *Comparative Education Review*. Acknowledging insights from her colleagues Matthew Zachariah, Andrew Effrat, D. Paul Lumsden, Michael Levin, and Michael Apple, the article's purpose was to provide a perspective for the study of educational issues through the anthropological lens. Examples of such studies were: cross-cultural studies in education and socialization, a comparative study of schools as institutions within a specific socio-cultural context, a school ethnography, and the use of anthropological theory and methodology in studies using a sociological framework (Masemann, 1976). This article also included Vandra's expanded understanding of the components of school ethnography as related to comparative education. Where this relationship can be useful is in the study of "under-achievement" of the student, in the examination of the process by which operational variables of formal educational systems

are related to educational performance and other outcomes, and in the interpretation of what lessons students actually are learning from their school experiences (Masemann, 1976, p. 374).

Vandra noted that speaking at her first CIES conference and accepting the invitation to teach at the University of Wisconsin set her path towards her career in comparative and international education.

While Vandra was an Assistant Professor in the Department of Educational Policy Studies at the University of Wisconsin, her main research project was a study in the Milwaukee, Wisconsin schools where she recognized the need to understand the comparative nature of bilingual education for Spanish and Anglo monolingual students in the same classrooms. Her work was published in 1979 in the *International Review of Education* as, “Ethnography of the Bilingual Classroom.” She found that in schools with a bilingual program the community surrounding the school appears to be a strong influence on the climate of the language use in the classroom, the proportion of participating children influences the impact the program has on the climate of the school, and the instructional practices used by the teacher to organize the class day influences the “language climate” of the classroom (pp. 305-306).

After the San Francisco conference in 1975, Vandra attended every CIES conference until the present, missing only a few in 43 years. Beginning in 1982, Vandra increased her involvement with the Comparative and International Education Society (CIES) in the United States when she became a member of the Board of Directors, a member of the CIES Ethics Committee, and Chair of the Awards Committee. Her leadership to the society did not conclude there. Vandra was elected Vice President of the Comparative and International Education Society of Canada (CIESC) in 1983, President in 1985, CIESC Representative to the World Council of Comparative Education Societies meeting in Rio de Janeiro in 1985, Vice President and President Elect of the CIES in the United States in 1987, and then President of the CIES in the United States in 1989. She led the establishment of the CIES Gender Committee the following year.



Vandra speaking at the 14th World Congress of the WCCES in Istanbul, Turkey, June 2010. Photo courtesy of Vandra Masemann.

From 1987 through 1991, Vandra served as the President of the World Council of Comparative Education Societies (WCCES). This led to her term as Secretary General of the WCCES from August 1996 through 2000. In addition, Vandra served as a member of the International Steering Committee for the Education for All Conference in Jomtien, Thailand in 1989 until the conference itself in 1990. For the past eight years, she has served on the Editorial Board of the *International Review of Education*. To ensure that women in CIES were properly represented, Vandra set up the Gender Committee as an ad-hoc committee at CIES in 1990 with the aim of examining the role of gender in the whole structure of CIES. It eventually became a Standing Committee and has held preconference workshops for many years.

Vandra referred to the history of the WCCES, and to those who contributed to the growth and sustainability of the organization. She values the contributions of Raymond Ryba, Nikolay Popov, David Wilson, Edmund King, Kim Sebaly, and Erwin H. Epstein who encouraged the establishment of the WCCES Archives at Kent State University in the United States. Joining with authors Mark Bray and Maria Manzon in 2008, Vandra wrote and edited chapters of *Common Interests, Uncommon Goals: Histories of the World Council of Comparative Education Societies and Its Members*. Its purpose was not only to “compare the comparers” but also to document the influences that created the shape of the field of comparative education in



Vandra delivering WCCES historical file boxes to the Kent State University Archives. On the left is Cara Gilgenbach, Kent State University Archives Manager, and in the middle is Kim Sebaly who had worked for many hours organizing the collection at the beginning of the WCCES Archives at Kent State University. Photo courtesy of Vandra Masemann.

various countries (Masemann, Bray, and Manzon 2008, p. xvii). Vandra and co-author Erwin H. Epstein wrote the first chapter of the book where they celebrated the work of Joseph Katz of the University of British Columbia who first had the idea to observe an International Education Year and who assisted with developing the three objectives of the Council: the internationalization of mankind, the cooperation of cultures, and the rationalization of societies (pp. 13-14). The chapter also provided the two themes for the first World Congress held in August 1970: the importance of comparative and international education in the education of teachers and the role and rationale for educational aid to developing countries (p. 16).

Vandra’s involvement with CIE conferences is also driven by her belief that the conferences should encourage new scholars to develop their careers in CIE. As she notes, the annual CIES conference continues to provide positive role models in the field of CIE, and “attending the annual conference gave me my intellectual shot for the year.”

After nearly 46 years of teaching and research at many institutions of higher education including the University of Toronto, the State University of New York at Buffalo, the University of Pittsburgh, the University of Wisconsin, and Florida State University, Vandra is now retired and is an adjunct professor in the Department of Leadership, Higher and Adult Education at the University of Toronto. She continues to be involved in the CIES, CIESC, and WCCES and supports the growth of CIE programs.

The Evolution and Strengthening of CIE

Researching the reasons CIES was founded, Vandra found that there was more emphasis on providing an internal domestic movement for schools of education while widening the curriculum for teachers to learn about education in other countries and less of an emphasis on international development education. As noted in her Ways of Knowing CIES Presidential Speech, Vandra shares, “the shape of knowledge itself ... changed as the basis for knowledge claims changed” (Masemann 1990, p. 469). As this CIE emphasis has evolved, Vandra has observed that far less than 50 percent of those graduating from CIE programs can expect to have a tenure track teaching position in the field. Vandra states the CIE field has proliferated to assist those seeking careers in external agencies and governmental aid agencies, such as in Australia (Australian Aid), and Canada (CIDA), and many other countries.

In the current university environment, Vandra has witnessed the increase in the number of faculty being required to teach several different types of courses. Noting a shift from a more narrow academic focus to a much more global international focus or “global village” as noted in her *Ways of Knowing* Presidential Speech, Vandra has watched academic programs fill with classes more related to international development or current issues such as the AIDS epidemic, education in refugee camps, and education in post-conflict situations, as well as issues that deal with equality, gender, race, and ethnicity.

The period of time from 1950 to 2000 saw the rise of international organizations such as the UN and its related agencies, the Organization of African States, the European Union and others. Significant international actions affected education in European countries where there were whole projects on “Europeanizing” the curriculum. As observed by Vandra, this period saw an increasing division of the world into trading blocs, faster communication among countries, and a rising awareness of diversity.

Wolfgang Mitter (1997), who succeeded Vandra as President of the WCCES, identified five comparative education paradigms and the related decades. The 1950s were associated with the East-West conflict, the 1970s with large-scale educational reform, the late 1970s and 1980s with intercultural education in multicultural societies and gender issues, the late 1980s and 1990s with transformation processes and post-modern “revolt” against the predominant theories of modernity, and the 1990s with universalism versus cultural pluralism (p. 401). In an article written in Mitter’s honor upon his 70th birthday, Vandra wrote, “he used his own biographical experiences as a model to show the various perspectives from which he was able to view these changes over the last forty years” (Masemann 1997, p. 127).

Just as CIE outreach was growing through conferences and published journal articles, Vandra acknowledges an increasing number of people became more aware of culture differences through the growth of electronic communication was. In the last quarter century, the innovations in electronic communication have allowed the growth of a global perspective and the ability to incorporate it into school curricula. With the ability to offer comparative and international distance education programs, Vandra adds, “technology has really blurred these boundaries ... these students are not unreachable ... it makes the whole issue of location so much fuzzier.”

As early as 1975 when colleges of education sought to provide foundational courses in CIE, Vandra had a deep interest in the subject and met with professors at CIES conferences to emphasize the need in providing more comparative education options to teacher education candidates. In her paper developed for the 60th Anniversary of CIES, Vandra listed two reasons for the founding of CIES. The first reason was to give teachers and graduate students a comparative aspect and global perspective of education while the second reason was to improve the professional practice of teachers through showing them that there was more than one way to provide education in the world (Masemann 2016).

Vandra pointed out another reason for the growth and strengthening of the CIE field: the need to provide CIE access to post-graduates who will work in global aid organizations. Compared to the years from 1870 to 1950 when there was more emphasis on countries being divided, it was common to have more books being written about “othering” or people as enemies after WWII. After 1950, Vandra noted that there were more people in the United States who could speak multiple languages. By 1975, there were over 25 million of those living in the United States who spoke another language than English (Masemann, 1979, p. 295). Increasing their funding for foreign area studies programs to aid students who wished to learn more about other areas of the world, the United States government realized the value in having more trained personnel who had a background in CIE. Now for several years, it has been part of United

States governmental foreign policy to fund CIE programs in order for the United States to produce more highly-trained professionals who are knowledgeable about different areas of the world and have trained staff for their embassies as well as their Foreign Service posts.

International aid agencies have also benefited from the growth and the strengthening of CIE as these agencies could not function without employees who are knowledgeable in international perspectives, who have intercultural language abilities and skills, who are able to relate to people of different backgrounds, and who are able to pick up on cross-cultural cues. These agencies include among others, USAID, World Vision, CARE, PLAN, UNICEF, OXFAM, Doctors without Borders, War Child, and the United Nations High Commission for Refugees.

Throughout the 1960s as the post-World War II economy was booming and industrial countries could allocate more funds to their foreign aid budgets Vandra found CIE continued to grow and strengthen. These international programs have sent people to other countries on exchange or had people from other countries study in the United States. In Canada, the Canadian government has supported both the International Development Research Centre and the Canadian International Development Agency's efforts to provide funding for research projects all over the world and to support countless numbers of graduate students from all over who come to study in Canada. The post-World War II baby boom increased the number of undergraduate students and created a need to expand the number of university graduate programs. As a result, there was a strong growth of the number of graduate schools throughout the United States and Canada. However, Vandra shares this was not without a competitive aspect as smaller colleges in more rural areas sought to raise their status to university or university-equivalence. As more volunteers returned from overseas posts, an increasing number of CIE graduate programs required students to have volunteer services in the Global South. These organizations include the Peace Corps, CUSO, Voluntary Service Overseas (VSO), and other organizations in Germany and Sweden. In terms of the value of a career in CIE, Vandra has observed,

That people become adept in cross-cultural communication so that when they go out into the Global South they should be able to make a good impression, be polite, respectful, and have a good professional relationship with people when they are doing their research.

While many students who pursue a CIE career are seeking positions in other countries, Vandra found that there are people who because of their domestic responsibilities or certification requirements (e.g., lawyers who are unable to travel) seek opportunities at the local level. Domestic CIE programs and conferences continue to be supported by those that are growing and strengthening the field close to their homes.

Over the years, the growth and strengthening of CIE has not happened without several challenges. From a gender point of view, Vandra recognizes that CIE was once a male-dominated organization with the expectation of travel to expand one's career in the field. Males were more able to travel abroad while women experienced fewer opportunities in CIE because of their childrearing responsibilities. Higher education career counseling was once based on these same perspectives. As students seek careers in the academic environment in a field that may interest them, Vandra warns from an academic fulfillment perspective that it is more difficult than it ever was. People with more broad interests, who are flexible and willing to tailor their course development to what their department is focused on, will be the students or faculty that will succeed.

From a university funding perspective, another challenge comes from the organization of schools of education themselves. Vandra provides the example of when she taught at Florida State University in the 1990s. The program responsible for teaching CIE was merged into the

department of educational leadership, causing a completely different focus, and as Vandra describes it, “a change from knapsacks to briefcases.” Since the Education for All Conference in Thailand in 1990 and the definition of the various educational goals which later became the Millennium Development Goals and more recently the Sustainable Development Goals, Vandra feels that there has been a much more bureaucratic and quantitative approach to measuring academic achievement worldwide.

When asked about the challenges in planning a career in CIE, Vandra suggests it is a multi-plex field as described in Maria Manzon’s *Comparative Education as a Field* thesis written for the University of Hong Kong. Manzon (2011) found there are status differentials in different countries and institutions, different nodes in CIE that have status, and differences in how people who are trained in the disciplines relate to CIE as a field. Vandra explains that CIE is a very complex field, one that could be labeled fragmented; there are many different aspects for research.

Finding one’s identity in the CIE field, defining the people that one wishes to model one’s research after, and whom one accepts as a mentor will greatly influence the different types of innovative CIE research. As Vandra reminds her students who are conducting the literature review section of their thesis, this involves writing about the scholars to whom the student is drawn and with whom the student feels a strong intellectual connection.

In terms of research and from an epistemological perspective, Vandra’s research experience has identified another challenge leading to a reinvention of CIE. As university programs and many schools of education are seeking to ensure their programs are producing a return on investment, universities are underfunding social science-focused programs relative to the funding to support scientific, technical, or business higher education programs. This thought is troublesome to Vandra as she worries about the eventual elimination of CIE programs.

Vandra has always been an advocate for gender equality in education, but she realizes that there can be challenges for women considering a career in CIE. They may be hampered by cultural roles for women in their home university or overseas. They may be limited in where they can safely travel to conduct research. And they may not be taken seriously by their male counterparts.

Impact on the Field of CIE

Vandra is currently retired and an Adjunct Professor in the Department of Leadership, Higher Education and Adult Education at the Ontario Institute for Studies in Education at the University of Toronto. She says that the most impactful projects or contributions she has been involved in derive from the fact that she was a trained anthropologist who understood cross-cultural variations and who had a long background in teacher education. While teaching about cultural diversity in the classroom, Vandra helped teachers become more comfortable with the idea of teaching in culturally-diverse schools to include anti-racist and multi-cultural education. Her impact on her community includes developing workshops for members of the police department in multi-cultural and multi-racial urban communities. She worked extensively with the Boy Scouts to make the organization more multi-culturally responsive. While on contract for the Ontario Human Rights Commission, she researched how various front-line government agencies provided services to a diverse clientele. Vandra also enjoys the continued following from those that still see the relevance in the work she conducted at the girl’s boarding school in West Africa. Over 40 years after its publication, her article, “The Hidden Curriculum of a West African Girls’ Secondary School,” continues to be required reading on education and anthropology course outlines.

As the only non-tenured faculty member who was elected President of CIES, Vandra has had a continuous period of service to many academic societies since 1978, has volunteered for the WCCES for 27 years, and continues to see her volunteer service as a part of life. She embedded this virtue of service in all of her children who continue to be active in civil society. When Vandra was awarded the CIES Honorary Fellow Award in 2008, she was recognized for her efforts during her Presidency to help CIES make the transition into a more professional organization with professional standards and improved representation of women and diverse groups.

Vandra has been involved in many professional organizations over the course of her career. Currently, Vandra serves as a member of the Editorial Board for the *International Review of Education*. In addition, she has been active in several community volunteer organizations. These include the West Toronto Junction Historical Society, the Malvern Red and Black Society (her high school alumni association), and the Project for the Advancement of Childhood Education (PACE Canada) where her family was a founding member of the organization that adopts and supports some 250 basic schools in Jamaica.

When asked about publications or scholarly works that she has produced and considers to have had the greatest impact on CIE, Vandra cites, “Anthropological Approaches to Comparative Education,” and the article she published in 1982, titled, “Critical Ethnography in the Study of Comparative Education”—both published in the *Comparative Education Review*. The chapter that she wrote entitled “Culture and Education” in the textbook *Comparative Education: The Dialectic of the Global and the Local* by Robert F. Arnove and Carlos Alberto Torres, took approximately two years to write as she condensed all of her lectures into one article. This article summarizes her main thoughts about the relationship between culture and education from an epistemological sense. Vandra also continues to be asked to provide updates to the chapter she authored which is included in successive editions of the textbook by Arnove and Torres.

Considering how CIE is relevant to teacher education, it is the chapter entitled, “Gender and Education,” written when she was at OISE with her student Kara Janigan as lead author included in *Comparative and International Education: Issues for Teachers* that Vandra speaks of with pride. This was a collaborative effort between the two authors where they combined case studies of gender and education in East Africa and Canada with a summary of theory as it applied to teacher education. The book was developed for students in the global education stream, making it relevant to the classroom and to teachers who really wanted to think about their professional practice in relation to gender.

Striving to inform others about CIE, Vandra’s research has been referenced many times in various international books. These include the “Ethnography of the Bilingual Classroom” published in the *International Review of Education*, “Critical Ethnography in the Study of Comparative Education” published in the 1982 edition of the *Comparative Education Review*, and “Comparative Education in Canadian Universities” published in the 2008 edition of *Canadian and International Education*. She has authored or co-authored 18 chapters of respected books on the subject of CIE. These chapters include “Access to Education” published in *Multicultural Education: A Partnership*, “Comparative Perspectives on Multicultural Education” published in the *CSSE Yearbook of Education* in 1981, and “Educational Reform: The Impact of Indigenous Forms of Knowledge” published in the *International Encyclopedia of Education* in 1994.

When asked what was the most amazing memory of her career in CIES, Vandra exclaimed that it was when she was handed the gavel by Michel Debeauvais in the General Assembly of WCCES and became its President in Brazil in 1987. After her Presidency ended in 1991, Vandra stayed active in the WCCES and was later named to the position of Secretary General after Raymond Ryba became ill and could not fulfill his obligations. Following her leadership in the position, Mark Bray from Hong Kong became the next Secretary General and later the President.



Group photo of the WCCES Executive Committee at the World Congress in Cape Town, South Africa in 1998. From left to right, back row: Ryszard Pachocinski, Marco Todeschini, David Turner, Jean-Michel Leclerc, Robert Verhine, Carlos Alberto Torres, Anthony Welch, Mark Ginsburg, Sheldon Weeks, Tatsuo Yamada, Yang Shen-Keng, and Christine Fox; middle row: Margaret Sutherland, Byung-Jin Lee, Kyun-yeup Lee, Rosemary Preston, Peter Kallaway, Nina Dey Gupta, Lee Wing-On, Peter Fan, and N'Dri Thérèse Assié-Lumumba; front row: Mark Bray, Vandra Masemann, Crain Soudien, David Wilson, Wolfgang Mitter, and Namgi Park. Photo courtesy of Mark Bray.

In 2000, the WCCES celebrated its 30th anniversary. Through the relationship established in the organization and realizing the role of the computer was affecting the archival retrieval of historical documentation, Vandra, Mark Bray, and others thought it was important to compile a book of the histories of the member societies to recognize the anniversary. The history book, published in 2007 as *Common Interests, Uncommon Goals: Histories of the World Council and its Members*, was edited by Vandra Masemann, Mark Bray, and Maria Manzon. The co-authors decided that Maria Manzon, who Vandra felt was part of the next generation of the World Council, would write the concluding chapter and focus on the meaning of the previous nearly four decades of development of the WCCES. Manzon would later expand her ideas into an award-winning thesis about the CIE field.

Vandra's experiences in CIE have led her to being offered opportunities outside the realm of education, notably in the areas of assisting organizations to serve their diverse clientele more effectively in a multicultural society. In the mid-1990s, Vandra recalls accepting a memorable consulting job in Toronto as an anthropologist by one of the smaller municipalities to understand how they could improve their services for visible minorities. From 1982 to 1995, she worked with her partner, Karen Mock, a psychologist, in a firm called Maseman and Mock,

Consultants in the Social Sciences. They completed over 25 projects. In 1995, they both got the call to return to academia (Vandra) and organizations working in the field of human rights and anti-racism (Karen) respectively.

When she became President of CIES in 1990, she titled her Presidential Speech, “Ways of Knowing,” for which she received the George Bereday Award the next year for the best CIES article of 1990. Vandra explained how conceptions of ways of knowing have restricted the meaning of CIE in the way the subject is taught to students and used in research (p. 465). She concluded with the thought that a more holistic approach to learning and teaching in the classroom is needed to make the association between a global perspectives approach and how the teachers and learners relate to the larger realm of CIE (p. 472). Looking back at this moment in her career, Vandra recalls getting on the elevator after she gave her speech and having a female graduate student tell her that because of Vandra’s speech the student could now do the thesis that she really wanted to do. Vandra said that this is really what her contribution to CIES and to the students in CIES is all about. Those that understand CIE appreciate the fact that Vandra sees beyond where the field is at the moment and that she continuously seeks different ways of doing research, different ways of seeing the world, and different kinds of epistemologies.

Currently, Vandra strives to further the mission of CIE. She is writing a chapter for the Oxford University Press regarding the most significant feminist to influence her life, Gail Paradise Kelly. Because Gail was the one that urged Vandra to come to meetings, to write, and to resist the patriarchal paradigm, Vandra recalls that, “Gail Kelly was the only person who ever pushed me around.” Vandra was grief-stricken when Gail died of complications following breast cancer in 1991.

“Comparative education has served to improve the professional practice of teachers throughout the United States and Canada,” says Vandra. Assuring that the light of knowledge continues to shine outside the field and the World Council of Comparative Education Societies, Epstein (2016) states that Vandra’s knowledge of the field of comparative and international education continues to contain the light of knowledge as 40 additional organizations all over the world have been developed because of the work of the CIES (p. 294). Vandra continues to think of her life in an anthropological perspective and to be an advocate for the CIE field.

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About the Authors

Laura Monks

Laura Monks is a doctoral student in the Leadership and Policy Studies Program at the University of Memphis Lambuth Campus. Her research interests include faculty development, student success initiatives, and prior learning assessment. Beginning her 25th year in higher education, Laura is the current President of the Tennessee College of Applied Technology in Shelbyville, Tennessee where she leads workforce development efforts and links highly-trained graduates to industry. Laura resides in Fayetteville, Tennessee with her husband, Terry, where they raise beef cattle on the family farm.

W. James Jacob

W. James Jacob is Professor at the University of Memphis Department of Leadership. Prior to joining the University of Memphis, he served for 10 years at the University of Pittsburgh as Director of the Institute for International Studies in Education. He has written extensively on comparative, international, and development education topics with an emphasis on higher education leadership, strategic planning, and organizational trends. His most recent books include *Strategic Transformation of Higher Education: Challenges and Solutions in a Global Economy* (with Stewart E. Sutin, Rowman & Littlefield, 2016); *Trends in Chinese Education* (with Hongjie Chen, Routledge, 2016); *Indigenous Education: Language, Culture, and Identity* (with Sheng Yao Cheng and Maureen Porter, Springer, 2015); *Community Engagement in Higher Education: Policy Reforms and Practice* (with Stewart E. Sutin, John C. Weidman, and John L. Yeager, Sense Publishers, 2015); and *Policy Debates in Comparative, International, and Development Education* (with John N. Hawkins, Palgrave Macmillan, 2011).

Appendix 1: CIES Conference Acceptance Letter



FACULTY OF EDUCATION / DEPARTMENT OF EDUCATIONAL FOUNDATIONS

January 27, 1975

Dr. Vandra L. Masemann
Department of Sociology in
Education
The Ontario Institute for
Studies in Education
252 Bloor Street West
Toronto, Ontario
M5S 1V6

Dear Dr. Masemann:

I am enclosing for your use the Pre-Registration Form for the C.I.E.S. Meeting in San Francisco.

Please may I have an outline of your paper by February 15? The outline need not be more than 300 words in length.

I would appreciate receiving a copy of the paper by March 15.

Every good wish.

Sincerely,

Mathew Zachariah
Professor

MZ/rw

Sent Feb. 11

THE UNIVERSITY OF CALGARY / 2920 24 AVE. N.W. CALGARY ALBERTA CANADA / T2N 1N4
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Appendix 2: CIES Conference Panel on Theory and Method in Comparative Education

THE UNIVERSITY of CALGARY

TO Dr. R. F. Lawson, President
C.I.E.S. INTER-OFFICE

FROM M. Zachariah
Session Chairman DATE: December 11, 1974
Theory and Method in Comparative Education

March 28 10:30 a.m. to 1:00 p.m. (Franciscan)

10:30 - 12:00: Formal papers and general discussion.

Francisco O. Ramirez, Department of Sociology, San Francisco State University

- "Comparative Studies on Education in the Positivist Mode."

Vandra L. Masemann, Department of Sociology in Education, Ontario Institute
for Studies in Education

- "Comparative Studies on Education in the Anthropological Mode."

Mathew Zachariah, Department of Educational Foundations, The University of Calgary

- "Comparative Studies on Education in the Dialectical Mode."

12:00 - 1:00: Small group sessions with those who presented papers.

MZ/pm

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