# Editorial:
# The IEJ: CP, it is a-changin'

## CAUTIONARY NOTES: ENCOUNTERING CHANGE WITH HOPE & HEART

During this year of rattling and raging challenge and change, the new Editorial team and authors at the IEJ: CP committed to keep up our strokes within the growing waters surrounding us all, and that surround some more immediately and literally within Epeli Hau'ofa's (1993) Oceanic "sea of islands". Aiming to not hackney Dylan's cautionary, yet hopeful, anthem[1] too, too much, I also invoke its enduring relevance for how members of the OCIES and the IEJ: CP team have elected to engage with significant decisions about our future as an open-access education journal managed by academics, working on issues in Comparative and International Education (CIE) across, from and within Oceania. I'll then share a more recent vision of caution and hope, created closer to the journal's Oceanic home, for what could be our "better future" (*Uluru Statement from the Heart*, 2017), before introducing the far-reaching contents of our last issue for 2020.

Ahead of doing so, I acknowledge the Traditional Custodians of the Land from which I write today, the Gadigal of the Eora nation. I pay my respects to their Elders past, present and emerging. I also emphasise that these Lands were never ceded.

Consistently holding this in mind as we live and work, and during times that may have felt more often confronting than promising, we've reflected monthly as an Editorial team on the nature and survival of aspects of communication, higher education, knowledge production, publication and scholarship related to the journal, and of our work as educators and scholars. We've attempted to build on changes made by prior Editorial teams, and to offer our own, in light of our 2019 Review of the Journal (and see related article, forthcoming in 2021). We have also done this in light of increasing academic demands on the members of our voluntary team, amidst much larger shifts in enmeshed intellectual, political, social environments and 'policyscapes' (Carney 2009).

The doorways, halls, windows and walls of these changes have taken material forms of: applying Creative Commons licensing to articles (here, we might consider Dylan's recent copyright-related choices as author and artist); application and acceptance as a member of the global Free Journals Network, and; distribution and diversification of our content, and leadership structure. We have also initiated mentoring and internship programs aimed at sharing with our up-and-coming CIE community of artists, authors, colleagues, educators and thinkers. A guiding aim has been to consistently acknowledge and support content and

[1] 'The times, they are a-changin', Music and lyrics composed by Bob Dylan, Warner Bros. Records, 1963.

formats that are reflective of the broader range of existing modes of communication and knowledges in our world. In this, we continue to contribute to the long, shared and vast work of decolonising, in multiple contexts and levels of activity.

In this island-continent nation where the IEJ: CP was founded and is published, and that most now know as Australia, the recent *Uluru Statement from the Heart* may represent another cautionary, yet hopeful, vision. It is one that has yet to garner the much wider attention and action that it merits – requires - from all quarters of this somewhat differentiated-ly 'lucky' country that has necessitated such a Statement. I take this opportunity to raise awareness of it, and share with our international readers, in case you have not yet come across it: https://fromtheheart.com.au/explore-the-uluru-statement/. The site shows the history, the peoples, the text and artwork of this important invitation, and is worth even a few minutes of your much vied-for time; the Statement itself is succinct. It is in such a spirit of collaboration, persistence and recognition that we aim to continue the work of the IEJ: CP, through the energies of our people, processes and publications.

## 'COMMUNITY VOICES' IN THE IEJ: CP

To that end, Volume 19(2) opens with our inaugural 'Community Voices' piece. By way of general introduction, articles in this section might not necessarily come from academia – and we envision that most may not - but are double blind peer-reviewed. Guidelines for the section include that authors should be education professionals working in civil society or non-governmental organisations, educators of various types, educational leaders, policy-makers, etc. Authors should also clearly articulate their role and its significance in relation to CIE. We stipulate that topics be of relevance to the concerns of the OCIES society, and wider current debates and topics within comparative and international education. While the significance of the topic should be clear and contextualised, it is not necessary to locate the contribution within wider scholarly literature, but authors may. We welcome shorter pieces, or those up to the length of more 'conventional' academic articles.

This first piece, from Oceanic regional education leaders Kabini Sanga, Seu'ula Johansson Fua, Unaisi Nabobo-Baba and Martyn Reynolds, offers us a "Pacific departure" from which to consider their experiences of a fresh take on an existing presentation format, but which is also derived from longer-standing histories, relationalities and work in education. It is a format that many who attend conferences may have taken for granted, before the Samoan measles outbreak in 2019 demonstrated that even opportunities to come together afforded by the conference format itself cannot now be taken as such: the keynote.

The example and exploration of the "keynote-as-storied-departure" that is shared in this piece affirms and suggests interpretations, openings and possibilities; it invites us to embrace those, and warmly. It is grounded in these leaders' multiple perspectives from Pacific island contexts, and beyond, with the presence of a designated listener amongst a wider ensemble of attendees, each engaging with one-another as learners at different stages of education and experience.

## ARTICLES IN THE *IEJ: CP*

The order of voices in Volume 19 (2) moves, geographically, from Oceania, to the wider Asia Pacific region, and then beyond, to North America, followed by the Indian Ocean. The current pandemic is addressed only in passing, in few of the articles; each offers an insight into situations just preceding this year's at once globally shared, yet drastically varied, experiences. Of course, we will see related adaptations and effects in future volumes.

Remaining within Pacific contexts, Robin Averill, Ali Glasgow and Fuapepe Rimoni share insights from their innovatively crafted case study that explored New Zealand-based educators' perceptions of Pacific cultural values from early childhood through to tertiary level. Through application of the *fonofale* model, they share challenges and possibilities of diverse teachers' interpretations of policy for equally diverse sets of Pacific learners at different stages of formal education.

With Wai-Chung Ho's article, we move to to the context of Hong Kong, and explore recent changes and challenges in education and society through a lens of nationalism 23 years on from its handover from the United Kingdom to China, Ho considers the sometimes fraught, and very recently urgent, questions of student identity formation through analysis of change in educational, political and social dynamics.

Next, Richard Porter and Noriko Porter offer novel perspectives from study abroad administrators in the context of Japanese higher education and globalising contexts. Their phenomenological work provides multi-layered evidence of factors in students' decision-making in relation to whether to undertake such experiences, and into the nature of those selected. Based on the resulting understandings, "culturally calibrated strategies", with increased peer and parent involvement, are offered as potential ways to encourage participation.

Still within the area of higher education and drawing on administrators' perspectives, combined with those of students, we shift with Sosanya M. Jones, to a Canadian context. Through a lens of institutional diversity theory, Jones considers the limits of rhetoric in the production of inclusive environments. The focus of this qualitative case study is on lived experiences of institutional efforts to promote substantively inclusive interationalisation, and cross-cultural learning.

With our final article, from Aishath Shafina, we remain in higher education, and circle back to the Indian Ocean contexts of the Maldives, to reflect on the complex and layered ways in which gender and sex can influence students' subject selection. Here, again, we see communities, geographies and socio-political dimensions intersecting within particular contexts for change and resistance.

## FUTURE *IEJ: CP* ISSUES

In our next issue, the first of 2021, we are excited to launch regular 'Creative Works' content. Please do submit your Creative Works through our website, and spread the word about this and the Community Voices sections to colleagues and friends.

We aim to share a selection from our 2020 Festival of OCIES virtual conference, so please also submit your works if you were a presenter at the Fest'. We hope, too, that we will be able to publish a multi-lingual issue next year, and incorporate regular multi-lingual content into the journal; please get in touch if you are interested on working on this, or have any queries about materials that you would like to submit. As final note for this year of the IEJ: CP, we do hope that you will continue, people, to come gather 'round, with eyes wide, as we continue to cultivate and share one another's CIE research, stories and voices.

## REFERENCES

Carney, S. (2009). Negotiating Policy in an Age of Globalization: Exploring Educational "Policyscapes" in Denmark, Nepal, and China, Comparative Education Review, 53(1), Available: https://www.jstor.org/stable/10.1086/593152?ai=so&mi=0&af=R&seq=1#metadata_info_tab_contents

Hau'ofa, E. (1993). *'Our Sea of Islands', in* Eds. Vijay Naidu, Eric Waddell, and Epeli Hau'ofa, *A New Oceania: Rediscovering our sea of islands*, Suva

*Uluru Statement from the Heart* (2017). Available: https://fromtheheart.com.au/explore-the-uluru-statement/

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# The keynote-as-storied-discussion: A Pacific departure

**Kabini Sanga**
Victoria University of Wellington, NZ: *kabini.sanga@vuw.ac.nz*
**Seu'ula Johansson Fua**
University of the South Pacific, Fiji: *seuula.johanssonfua@usp.ac.fj*
**Unaisi Nabobo-Baba**
Fiji National University, Fiji: *unaisi.baba@fnu.ac.fj*
**Martyn Reynolds**
Victoria University of Wellington, NZ: msdfreynolds@gmail.com

*It is a rare event when senior scholars and actors in a field come together; more so when that takes place in the company of new and emerging scholars. Even rarer are such occasions in the Oceania region, where distance can mediate against key players coming together in time and space. When the stars align, the opportunity must be seized. This article portrays aspects of an event when, due to otherwise unfortunate circumstances, three senior Pacific educators, scholars, and leaders offered glimpses of their experiential learning and leadership by presenting a storied discussion of leadership. The account given here discusses ideas derived from that storying. It is an examination of the form used to enact the educators' pedagogical purpose; keynote-as-storied-discussion. This innovative way of delivering a keynote leverages the intersectional value of the tone-setting intent of a keynote, the emotional and experiential layering of storying, the pedagogical potential of woven narrative strands, and the discursive exchange of ideas.*

*Keywords: keynote-as-storied-discussion; Pacific leadership; Pacific learning*

## INTRODUCTION

### Of keynotes

The term 'keynote' originated from the *a capella* style of unaccompanied music (Marshall, 2011). In this, a singer sets a note before the group sings. The keynote works to coordinate, align, and make beautiful what follows. It is a solo moment that simultaneously acknowledges the significance of the group. *A capella,* an Italian term, means music in the style of the chapel (Singleton, n.d.). When voices were the prime instruments of worship, the keynote set the frame for harmony to the glory of God. Over time, although its core meaning remains, the application of the term 'keynote' has shifted. It now refers to an opening presentation that is longer than others at a

conference, out of the competition of parallel streams. A keynote has become a prepared performance, generally attracting remuneration for the speaker (Hourigan, 2019). However, the aim has remained: to galvanize, focus and "tune" the gathering.

This article discusses a variation on the conference keynote tradition by exploring the "keynote-as-storied-discussion" in a Pacific context. This format steps away from conference tradition in several ways. First, a discussion involves more than one voice. Second, it cannot be fully prepared; discussion is dialogical, created in the moment. Third, a discursive keynote is relational, involving multiple speakers, listeners, *and* their relationships. What follows is an exploratory discursive account of a keynote-as-storied-discussion that took place in Lautoka, Fiji. The keynote-as-storied discussion in question aimed to set a tone of collaboration to draw attention to leadership as relational influence.

## The occasion

It is important here to pay respect to those who died, suffered, and continue to grieve as a result of the 2019 Samoa measles epidemic. This sad event led to the postponement of the Oceania Comparative and International Education Society's (OCIES) 2019 conference in Apia, a much-anticipated event to be hosted at the National University of Samoa. Relationships of trust and dependence built over decades by Pacific leaders support us as we pray and mourn with Samoa. These relationships also create new opportunities for those involved in the "fallout".

As an immediate consequence of the OCIES conference postponement, a Pacific academic event took place at Lautoka, Fiji. This was hastily organized but made possible because of the long-standing relationships between the Pacific leaders spearheading the get together, as well as functioning relationships on the ground in the host Lautoka Campus. A symposium was an opportunity for academics from the region to mourn Samoa's suffering together, and to share warmth and respect in concert with local Fijian students, scholars, and others. Thus, the DelaiNatabua Navuku seminar series came to host "A Talanoa with Oceanian Educators: Post-Colonial Education and Research in the Pacific Talanoa/Tok Stori" at Natabua Campus of Fiji National University on 25–26 November 2019. This opened with a keynote-as-storied-discussion constructed by central figures in the field for an interactive audience of new, emerging, and established Pacific scholars.

Keynote panels—keynotes to which several people contribute—are an accepted conference form. However, the literature suggests that when conference organizers draw on a keynote panel, discussion is constructed through difference, either by the deliberate presentation of a range of views on a single issue (Calvani et al., 2015) or through selecting speakers with opposite views (Carney et al., 2010). In such combative environments, criticality is not guaranteed, nor are the reciprocal benefits that are generally valued in Pacific academic encounters (Airini et al., 2010; Mila-Schaaf, 2006; Sanga et al., 2018; Vaioleti, 2006).

In Pacific forums, a "safe space" approach to collaboration through storying has sometimes been adopted. Virtual trans-Pacific *talanoa* (Fairbairn-Dunlop, 2015) and conference panel presentations (Wolfgramm-Foliaki et al., 2018) have been staged that benefit from space configured in this way. In addition, *tok stori* has been used as a discursive methodology in conference break outs (Fasavalu & Reynolds, 2019; Sanga et al., 2018). However, to our knowledge, the DelaiNatabua Navuku seminar series

keynote-as-storied-discussion is original in the way the keynote was configured to highlight discussion, inter-personal dialogue, and warm relationships. These combine as elements in a woven narrative to deliver a storied legacy of learning about leadership focussed on the experiential learning of Drs Seu'ula Johansson Fua and Kabini Sanga, woven together by the contributions of Dr Unaisi Nabobo-Baba and supported here through analysis from a listener's point of view by Dr Martyn Reynolds.

Seu'ula Johansson Fua is a Tongan academic and educational researcher. Her career began as a teacher in Tonga prior to joining the University of the South Pacific as a Fellow at the Institute in Education where she is currently the Director. Seu'ula's research and advisory work sees her working with Pacific Islands governments, Pacific regional organizations and international organizations and donors. Seu'ula travels extensively around the Pacific in her role as a researcher and the Institute of Education (IOE) Director. She opened the speaking at the Lautoka session.

Kabini Sanga is an Oceanic thought leader, mentor and educator and a consultant to Pacific Islands governments and donors in areas including leadership, international development and education. With Pacific Islands colleagues, he co-founded a number of cause movements including the Re-Thinking Pacific Education Initiative for and by Pacific Peoples, Leadership Pacific, Leadership Solomons, The Re-thinking Vanuatu Education, Re-thinking Micronesian Education movement and others. Kabini, together with Seu'ula, was a joint presenter at the Lautoka keynote.

Professor Unaisi Nabobo-Baba is the first indigenous Fijian woman to be appointed a university professor, initially at the University of Guam and now at the Fiji National University, where she is the Dean of the College of Humanities and Education. Unaisi began her teaching career as a high school teacher and, later, a teacher educator in Fiji and at the University of the South Pacific.

Dr Martyn Reynolds came to the Pacific region from London with Anglo-Welsh heritage. He seeks to learn from the thought leaders of the region in order to contribute support for the Pacific people with whom he is connected.

## METHODOLOGY

As an approach, we develop a methodology to relate positionality, context ,and analysis. Positionality is a matter of taking account of where researchers see themselves in relation to the research context. It can be understood relationally (Crossa, 2012), but even when positionality is understood through a blunt insider/outsider dichotomy, writers suggest that there is "a good bit of slippage and fluidity between these two states" (Merriam et al., 2001, p. 409). In a keynote-as-storied-discussion, the flows of power and speaker/listener roles normally assigned during a keynote are adjusted. When compared to a solo keynote, in a discursive event there are fairly porous role boundaries and the consequent potential to be relatively inclusive. In this case, the authors were initially involved in the keynote-as-storied-discussion as presenters, chair, or listener. However, as the event progressed, these roles were eroded. As a result, the autoethnographic sensibility of "recognizing that clear-cut distinctions among researchers, research subjects and the objects of research are illusory, and that what we call the research field occupies a space between these overlapping categories" (Butz & Besio, 2009, p. 1664) becomes relevant. Speaking is validated by listening, since

dialogue is predicated on a two-way process of meaning constructions. Thus, our positionality involves researching ourselves as a group of two speakers, one chair, and one listener involved in appreciating the keynote-as-storied-discussion in a Pacific research context.

The context, "A Talanoa with Oceanian Educators: Post-Colonial Education and Research in the Pacific Talanoa/Tok Stori", pays attention to the discursive construction of meaning. *Talanoa*, as a Pacific orality, involves discussion (Fa'avae et al., 2016; Vaka et al., 2016). In *talanoa*, safe relational space is constructed (Fairbairn-Dunlop, 2014) so that information can be freely shared or exchanged. Similarly, the term *tok stori* invokes a space of safety for revelation by storying (Sanga & Reynolds, 2019; Vella & Maebuta, 2018) in which narrative intersections produce a joint account of the world. As a methodological consideration, we pay attention to the contributions of individuals to the keynote-as-storied-discussion, but also to the weaving of meaning between individual stories and, through the structure created as a consequence of analytical processes, the shaping provided by listeners.

The analytical aspect of our methodology assumes that analysis provides insight by peeling back layers of meaning (Rutherford, 2011) to reveal greater depth of experience. We adopt an approach that owes much to Informed Grounded Theory (IGT) (Thornberg, 2012). In this, sensitizing concepts are used as analytical tools around which patterns of meaning coalesce, much as stories are made sense of by listeners through their previous knowledge and experiences. The sensitizing concept used for analysis of data in this case was leadership. This was further developed by iterative practice into nodes of leadership development, leadership challenges, leadership legacy and so on. In addition, through IGT we employed the sensitizing concept of weaving to acknowledge the innovative keynote-as-storied-discussion form.

As a result of the analysis, we came to approach leadership from a constructionist perspective (Uhl-Bien et al., 2014) that focuses on leadership as a process. In this understanding, followers and leaders are inextricably linked because they share a social context (Oc & Bashshur, 2013). In addition, leadership and followership are related dialogically as balanced aspects of a relational self (Ketokivi, 2010; Vaai & Nabobo-Baba, 2017). In this way, leadership as service (Strachan et al., 2010) and leadership as influence (Evans et al., 2017) are linked. In the context of the DelaiNatabua Navuku seminar series, the presence of senior Pacific academics in close contact with emergent Pacific academics and Pacific—particularly local Fijian—students gives life to this approach to leadership. This is because the symposium presented an opportunity, rare in a widespread region, for intergenerational academic relationships to develop, and for leadership stories of an established generation to be heard and appreciated by an ensuing generation.

The DelaiNatabua Navuku keynote-as-storied-discussion was recorded and transcribed with permission of the speakers. A chronological account replicating delivery could be given. However, we seek to add critical value by adding thematic analysis that both honours the storied nature of the material and sharpens the learning available. In effect, this account continues the discussion of the day, honouring the way that Pacific oralities, such as *talanoa* and *tok stori*, although located in time and space, can be woven into other occasions and forms, and permeate other relationships. The bulk of analysis was performed by a listener on the day, Martyn, who was able to use first-hand

experience of his own learning from the keynote-as-storied-discussion experience for interpretation of the transcription. The analysis was member-checked by all concerned.

## THEMATIC ANALYSIS

In this section, we present a thematic analysis of the DelaiNatabua Navuku keynote-as-storied-discussion. This is structured to reflect the contributions of multiple voices, the dialogic weaving of ideas, and the relationalities involved. Attention is also drawn to the relationships between the innovative form of the presentation, leadership stories of the discussants, the portrayal of leadership, and the context. In this way, form, function and purpose are in a unity that points to the potential of the keynote-as-storied-discussion in other Pacific contexts.

### Leadership as influence

In the opening section of the DelaiNatabua Navuku keynote-as-storied-discussion, the two named speakers, Dr Seu'ula Johansson Fua and Dr Kabini Sanga, were invited by the chair, Dr Unaisi (Una) Nabobo-Baba to story about key moments in their leadership journey. Her overall aim, in keeping with a keynote, was to prompt the discussants to set the tone and focus for the two-day seminar.

#### Influential experiences

To commence her leadership story, Seu'ula explained how two early moments directed her life path as a Pacific educational leader:

> I came to my 300 level courses, and I took an educational research course, and my professor came in one day with her big charts, data that she had collected and also some sticky notes and she was showing us how she was coding the data . . . I was absolutely amazed. I was, like, wow, this is so cool; that she could take the data, and she could code it, she could chunk it and reorganize it; so she was showing us how to analyse clustered data and right there in that—in that lecture room, I wanted to be an educational researcher.
>
> A few years back, I was teaching in Tonga . . . I was running between one high school and another . . . The one school that I'd go to, I would always come back crying, because my photocopied materials were never produced on time and I would turn up, they'd change the timetable that morning without telling me . . . One school was run like a well worked machine, timetable remains the same every week. Everything worked well. . . . It got me thinking about "What is it about these two schools?" and that's how I ended up looking into leadership. So, I then did my masters and PhD on leadership because I think leadership makes a difference for children and for students.

These episodes are Seu'ula's description of steps on her leadership journey. She recounts being influenced by the actions of an academic leader who revealed a new layer to the world. Through technique, potentially confusing events are deconstructed and then reconstructed into coherent meaning. As a result, appropriate action can be taken—the point of research. In Seu'ula's account, the revelation of finding something entirely new produced a life-changing inspirational emotional reaction. The story shows that when pedagogic leadership creates a shared learning space, the engagement produced can have profound effects. In addition, the second episode shows the role of

reflection in leadership development. Through reflection, Seu'ula's emotions, such as confusion, were channelled into a desire for explanation. Overall, these storied episodes illustrate how a combination of experience and deliberate reflection can be powerful in setting a person's leaderful direction.

**Influential people**

Kabini's initial storying also focused on the way meeting a significant person can be influential. What is different here is that he describes not a single action or moment, but the person as a whole. The story points to the relational value of esteem:

> There were only thirty of us in the entire country who were doing sixth form . . . I was given a scholarship to do law in New Zealand but during the sixth form year, I met a friend who became a life friend; I met John and John is my mentor—John Niroa from Vanuatu. I look up to John all the time, whether it was when we were students together or whether we were . . . at USP [University of the South Pacific], or whether we are just mates now as all the people . . . He's the most credible leader, he is the most ethical leader, consistently and throughout his life and that's why I honour my friend John. He came in . . . as a stranger from Vanuatu, just a student, and his life was so different from those of us who were there, and it really changed us . . . it's almost a Damascus experience for me . . . because of the experiences that I was having from my friend, John, it changed my way of understanding entirely. I went to the scholarship committee; I said to them, I'm not interested in the law scholarship, and they said, "You are bound to do law" . . . I said "I want to become a teacher".

In this story, the Biblical reference to St Paul's conversion indicates a life-changing moment that shifted Kabini's orientation and affected his whole-of-life career. The narrative reveals the way the values evident in his friend were influential, eclipsed difference, and were sustained. The account traces a life of friendship to an initial meeting and shows how time adds significance as relationships develop. This suggests that leadership as influence can involve a relationship powerful enough to stop a person in their tracks, overcome the inertia of what is expected, and affect the way that life is appreciated. This storying draws particular attention to relationality as a site of leadership.

**Weaving**

In a keynote-as-storied-discussion, an opportunity exists for the weaving of narrative strands by people other than the nominated speakers. In this case, Una, denoted as chair but acting as meaning maker, drew out the relevance of the threads so far presented to the DelaiNatabua Navuku seminar, a seminar of Pacific educators:

> [S]ometimes in our lives as educators, there comes a role model, that does not talk about role model or does not read role model from a Webster dictionary; they just live the life that influences [and in] quality education perhaps that the leader does have an impact.

Through her weaving, Una drew relationality to the surface of both stories. She clarified the concept of leadership as influence through the notion of the role model. This is a person who influences through their presence, actions, and example, rather than through management or any other specific techniques. Una also emphasized the potential of leadership to deliver excellence in education through the way others react to the actions of leaders.

Continuing the storying, Una provided coherence to the narrative by re-focusing, speculating on the way leadership roles carry practical and emotional costs.

> So, you are both educational leaders, more so your educational leadership spans the wider Pacific . . . what has been the joy for you . . .what has been a cost to you or challenge for you as a regional Pacific educational leader? Answer it the way you like it.

This intervention steered the storytelling by indicating a further layer of exploration to the discussants.

## Leadership benefits and costs

### Leadership as relationships

Seu'ula's story picked up the thread offered by Una and first dealt with positive experiential aspects of leadership, beginning with a reflection on her work at the Institute of Education, University of the South Pacific:

> I have been with the institute for fifteen years, it has been an absolute joy, a blessing. . . . I've jumped from a big boat to a small boat and coming to an island and then waiting until the wave is big enough so that it takes us over the reef and then . . . we have to get off and walk through water to go where we are going. I've learnt to ride a scooter. The richness and the diversity of our region is just an amazing journey that I feel really, really privileged to have had that opportunity to be in this place. The joy of course is all the people that I've met along the way. The relationships in every single island that I have gone through. The joy of sharing people's lives with you and you can come back five years later, ten years later and just pick up the conversation again.

Seu'ula's account portrayed a world of unique challenges made rewarding by an appreciation of the wealth of the region. The benefits are both personal and relational. Leadership here is recognizing and valuing what one has. This includes allowing the environment to be a positive influence. Seu'ula described relationships with people as a source of reward. This involves shared experiences that support deep and lasting connections. As a consequence, joy is exchanged between people through leadership as service.

### Leadership as sacrifice

Because leadership is integrated into life, for leaders there will always be a balance between the sweet and the bitter. Seu'ula's account of the price of leadership touched the personal and the relational:

> The cost, the cost has been my health, my white hair. The cost is missing out on my children's birthdays when you're not home. The cost is personal and my health. It's rough conditions sometimes working in our region, and as a field researcher, I'm out in the field a lot. . . . The challenge is always from our internal organizations. Organizations that are stuck, I think, in a way of thinking that remains perhaps the legacy of colonialism . . . . While the rest of our countries and our people are moving towards a different paradigm, the way our organizations are still structured and the processes . . . [are] yet to fully recognize the diversity and the shifting aspirations of our people. So in between that, I find that we're stuck.

Commitment to leadership can weaken physical health and affect family relationships. However, the subtext of this section of the story is that those unavoidable things are not as eroding as the avoidable issues. Seu'ula's account of obstructive organizational elements points to the inhibiting potential of poorly configured relationships. Where leadership as service meets leadership as inertia, the costs to a responsive leader can be great. Seu'ula's explanation, colonialism, references a relationship of superiority/inferiority. This is premised on priorities that do not respond to local needs, values or understandings. For leadership immersed in and motivated by context, this provides costly impediments.

**Weaving**

Una, as chair, responded to the strand of organizational leadership in Seu'uala's storying by recasting this as a prompt offered to Kabini. She framed the prompt by reference to Leadership Pacific, a cause movement that has supported conferences and seminars in Fiji, Solomon Islands, and Aotearoa New Zealand (Leadership Pacific, 2019); and to formal institutions. The keynote-as-storied-discussion allowed Una to further recognize context by connecting the joint narrative to the Fijian audience through the late Dr. Donasiano Kalou Ruru, well known and respected in Fijian academic circles, and to the University of the South Pacific, headquartered in Suva, Fiji:

> Kabini is . . . the person that has started Leadership Pacific. Dr. Ruru Donasiano was part of that, a lot of us were part of that. Kabini works at the University of Wellington in New Zealand but I always felt that his patronage spread right across the Pacific . . . Two years ago, USP in council also got Kabini to train the people on SMT [Senior Management Team] in leadership that is ethical, leadership that is thoughtful, leadership that is heart, leadership that is soul . . . Are there joys and costs as well for you?

In the next section of the keynote-as-storied discussion, Kabini built from Una's prompt to story his Island origins and his arrival into the institutional world:

> My university doesn't give me a role to say that I should be working around the region, in one sense . . . my engagement around the Pacific region has more to do with me as opposed to who my employer is. . . . I was born in a Solomon Island village . . . and consequently, a Pacific Islander . . . I cannot deny the fact that I am me and consequently have to be me within my world. Of course, the early exposure I had experienced as a USP student . . . to the wider Pacific, was really catalytic . . . those early experiences also pushed me towards an engagement with and assumption of responsibility for not just my localized territories but my expanding world . . . and hence my understanding and appreciation of what I do, and I am privileged to work in a university context whether or not that university is here or there.

In this section of narrative, Kabini imagined leadership as a journey in which the key reference points involve being true to yourself and recognizing, valuing, and actively responding to privilege. His stance referred back to the institutional thread opened by Seu'ula and amplified by Una by separating positional or role-based leadership from personal responsibility and influence. As Seu'ula indicated, these forms of leadership do not always align, proving costly when this is the case.

**Leadership as relationships**

As might be expected in a dialogic situation, main themes such as relationships and sacrifice were the subject of iterative development in the DelaiNatabua Navuku keynote-as-storied-discussion. Reconnecting with Seu'ula's storying, Kabini explained his ideas and experiences of leadership joy by discussing relationships and validation:

> Now, like Seu'ula, there has been much joy for me, engaging around the region with our people . . . We appreciate all our people whether . . . they go to school or they just live in their villages or . . . [are] doing what they do in the towns that we have around our region. You begin to appreciate all our people in our diversities, in our differences . . . There are only two key issues for all people. One is to know who you are, and two is to know that your life is actually valid, that there is meaning to your life, and in that sense for me, I think that's my greatest joy, to really just appreciate knowing our people all over the Pacific and knowing myself and also, knowing that, my people have brought value and much meaning to me and in that sense much joy.

Storying as a mode allowed Kabini to present his ideas about the importance of self-identity within a shared narrative that echoed Seu'ula's story regarding relational joy. In his story, as in Seu'ula's, leadership presented opportunities to engage with people in their own context and on their own terms. Kabini also pointed to the value of relationships to tell us who we are and to validate our life journeys. This constructs leadership as sense-making.

**Leadership as sacrifice**

Again, connecting his story with Seu'ula's, Kabini presented some of the costs of leadership. A common theme is that poorly configured institutional relationships can be more challenging than the unavoidable negative physical effects:

> Seu'ula has rightly said, challenges are numerous, but challenges and costs are necessary part of the joys of life. . . . I think misreading, misunderstanding by organizations of what our priorities are, is an important challenge and consequently if you are above advancing your career in an organization, sometimes the engagement with our people in the region, the service to our people through mentorship [take priority] . . . . [We] were flying over yesterday . . . the people sitting with me, were . . . think[ing] "You're just going out to enjoy the environment" . . . I don't tell them that there are parts of the Pacific after a day of visit . . . I get back to Wellington [and I'm] sick. Colleagues within organizational settings, don't appreciate the priorities you are trying to live out through your scholarship or through your work.

This section of the story shows Kabini's experiential learning of how leadership can be made more difficult when people in general, and colleagues in particular, assume their priorities to be universal. The presence of different understandings of leadership in institutions raises questions of whether to focus inwards by seeking leadership through self-advancement, or outwards by understanding leadership as influence in wider communities. Kabini and Seu'ula's stories show that their leadership agendas are people- not institution-focused.

**Strength in leadership**

The conversation turned to what it takes to be a leader. Two themes emerged from Seu'ula's Tongan perspective: courage and resilience. Courage is the capacity to face difficulties and challenges without being disabled by fear. In Seu'ula's account, this is not a momentary facility but requires resilience in the face of the long-term challenges afflicting the Pacific region:

> Courage is also being able to sustain that courage over a long, long time. Pacific people are known for our resilience . . . resilience comes from our "lotu", our faith; in knowing that we are part of a bigger plan, in knowing that tomorrow the sun will rise and things will be better . . . Resilience is also from our "kainga" our "matakali" . . . It's in our relationships with the people around us that we have courage to face another day . . . Climate change and health are the two key issues for us . . . We're fully aware of the NCDs and the impact and stealing generations of our people away from our time. Climate change is a reality; we have known it's a reality for a long time. Long droughts, water supplies, systems that we used to trust now running out . . . So what do we need? Leaders who are resilient and courageous because we need some real solutions; and not solutions into the future, it's solutions for today.

Seu'ula story here returned to the motif of constructive relationships. Relationships are the key to courage as well as to joy. She explains that leaders' leadership must confront real problems in realistic ways so that Pacific health is improved, and climate change does not result in annihilation.

**Weaving**

Through weaving, Una re-contextualized Seu'ula's story. She broke the "fourth wall" of the stage by delving into the audience to acknowledge those in the local community leading responses to climate change. In addition, she referred to another well-known female Pacific leader, Her Excellency Hilda C. Heine, the eighth President of the Republic of the Marshall Islands, an island state facing the immediate effects of climate change:

> [I]'d like to introduce Lia to all of us. Lia, is the best campus' leader for environment, climate. Rajneel of course is Lia's best friend . . . 'Ana is Lia's sidekick as well. . . . Hilda is Hilda to us, 'cause she's a sister that struggled a long time with the three of us . . . [with] the whole timetabling of students, the whole plantations, right across to Palau where the taro plantations of the women of Palau are also getting [covered] in the vindictive sea water.

Through this weaving, Una pointed to leadership as significant at local and international scales: leaders constructively face pervasive problems in their own context.

**Courageous leadership**

Kabini also linked courage, relationships and leadership. In his account, courage may include the capacity to confront the issues of the wider world, but also the willingness to be vulnerable in terms of the inner world:

> We encourage each other as the way with which we fill our gas tank . . . there are those material forces that we see in our face appearing overwhelming as we live our lives . . . if you live on a small island—you can't do anything about the cyclone that's causing all the damage and so I'll probably speak to the softer world that we are probably not paying attention to as much . . . Peoples of the Pacific are

> fundamentally relational people . . . We are people who generally, as a first response, think about the convenience, the happiness of the other first as opposed to our own and in that sense, please let's continue connecting with each other. Let's do so in ways that allow us to have real deep engagement with each other so that… our own vulnerabilities are exposed to each other . . . so that we might allow each other to grow not only in our strength areas but also in our weak areas.

The two worlds described by Kabini are both sites of potential leadership; each requires courage.

## Leadership and legacy

The final section of the DelaiNatabua Navuku keynote-as-storied-discussion saw the shared narrative turn to leadership into the future. The two named speakers offered their thoughts on how leaders can come forward to build on legacy, and how new leadership can be built through influence and deliberate action. In the context of the seminar, this section of the storied discussion offered challenge from established educators, scholars and leaders to new and emergent scholars and leaders, as well as to students and community members in attendance.

Seu'ula employed a Tongan metaphor of a mat as an indication of invitation:

> Leadership is a responsibility and it's a service and there are few who want to take it on but in terms of the future, we will continue to—as they say in Tongan—"folahi e fala ka e fai e alea". . . . we'll continue to roll out the mat and we will continue to invite you to come and sit with us on the mat and talanoa . . . because we need to remain hopeful and optimistic that there are leaders being prepared now for tomorrow.

A mat is a space of meeting, where exchanges take place and relationships are enhanced through *talanoa,* safe spaces of interaction (Faleolo, 2019).

In his turn, Kabini pointed to relational ways of learning and deliberateness as a quality for a leader. Acknowledging Seu'ula's comments to be *correct* and *brilliant*, he added:

> I will speak as one educator to another . . . be intentional about mentorship, if you do not have the people who are mentors, please find them. . . . If you are not mentoring the new generation of Pacific educators, please do so, right away . . . intentionally passing on the baton to our next generation of Pacific Islanders, whether it's within your family, or within the classroom, or the institution you are working with . . . The best practice of leadership is often presented as out of context and is always out of date. The right practice of leadership is what Pacific educators need to understand.

In both Kabini and Seu'ula's accounts, efforts to capitalize on leadership legacy are not accidental. An appropriate deliberate action on the part of new leaders is to engage with those who are already leading. In addition, Kabini's comments explain that leadership socialization best takes place in the context of community, specifically positioned in space and time.

## CONCLUDING DISCUSSION

The role of a keynote is to galvanize, focus and tune a gathering. In the case of the DelaiNatabua Navuku seminar, "A Talanoa with Oceanian Educators: Post-Colonial Education & Research in the Pacific Talanoa/Tok Stori", the note struck was to galvanize those present to accept the challenges of leadership by: valuing the benefits; embracing the costs; confronting the seemingly intractable issues facing Pacific communities; understanding well-configured relationality as the key of leadership as influence; and appreciating opportunities to engage with current leaders through observation, dialogue, and mentorship. In a context in which students, new and emerging educators, scholars and leaders, and a number of senior Pacific academics and leaders had come together, this was an appropriate note to sound.

A keynote usually draws from the *a capella* tradition through solo performance to guide the harmony that follows. However, the keynote-as-storied-discussion provides its own note about leadership. This note is embodied in the discursive format of the keynote, visible in the way woven stories foreground the value of collaboration and relationality in leadership and reduce the attention on the leader as a solo performer. In addition, the weaving provided by the chair served to connect leadership to context through local Fijian initiatives, references to valued Fijian leaders, and to honoured leaders in the region more generally.

A storied presentation embeds leadership in experiences, actions, emotions and relationships from which theories emerge. The intersections between stories provide a focus on commonalities despite the uniqueness of each of the leaders' experiences. In this way, a woven narrative points to stories as both everyday and transcendent. Thus, the pedagogical potential of constructing leadership as influence, relational, sacrificial, requiring courage and resilience, and an open invitation to all, is grounded for listeners in stories. These may be inspirational but are actually the accounts of those who have reflected and leveraged their leadership potential. The challenge to the audience was to produce harmony by seeking and enacting that potential in themselves.

## REFERENCES

Airini, Anae, M., Mila-Schaaf, K., Coxon, E., Mara, D., & Sanga, K. (2010). *Teu le va - Relationships across research and policy in Pasifika Education: A collective approach to knowledge generation and policy development for action towards Pasifika education success*. Wellington, New Zealand: Ministry of Education.

Butz, D., & Besio, K. (2009). Autoethnography. *Geography Compass, 3*(5), 1660–1674.

Calvani, T., Lipsky Jr, A., Montag, F., & Tritell, R. (2015). *Keynote panel discussion*. Heinonline. https://heinonline.org/HOL/Page?handle=hein.journals/gmlr23&div=46&g_sent=1&casa_token=9O9oP2iBh3oAAAAA:xXKnNt4aPVgJNpgXIF4n6w_QEqXW_mHd_hKBqLD2iYw1o73zCCcMJqno1XJJyg17l8gML-8fbQ&collection=journals

Carney, W. J., Gilson, R. J., & Dent Jr, G. W. (2010). *Keynote Discussion: Just exactly what does a transactional lawyer do.* Heinonline. https://heinonline.org/HOL/Page?handle=hein.journals/transac12&div=36&g_sent=1&casa_token=sqlaQThsdsYAAAAA:mG5nle0iF7h7BnlcS8Pwe-_rd7eir0M_1mDLC3Cfz1V3WjWiDkNgNZayGQEOb50lcYdAeJUgxg&collection=journals

Crossa, V. (2012). Relational positionality: Conceptualizing research, power, and the everyday politics of neoliberalization in Mexico City. *ACME: An International E-Journal for Critical Geographies, 11*(1), 110–132.

Evans, L. S., Cohen, P. J., Case, P., Hicks, C. C., Prideaux, M., & Mills, D. J. (2017). The landscape of leadership in environmental governance: A case study from Solomon Islands. *Human Ecology, 45*(3), 357–365.

Fa‘avae, D., Jones, A., & Manu‘atu, L. (2016). Talanoa ‘i ‘ae talanoa—talking about talanoa: Some dilemmas of a novice researcher. *AlterNative: An International Journal of Indigenous Peoples, 12*(2), 138–150.

Fairbairn-Dunlop, P. (2014). Where can we ask the questions we don't in class? In P. Fairbairn-Dunlop & E. Coxon (Eds.), *Talanoa building a Pasifika research culture* (pp. 15–31). Dunmore Publishing.

Fairbairn-Dunlop, P. (2015). Culturally safe spaces for Pacific education journeys from the periphery to the centre. *New Zealand Sociology, 30*(4), 199.

Faleolo, R. L. (2019). *Pasifika diaspora research methodology: Review of literature*. Aboriginal Environments Research Centre, University of Queensland.

Fasavalu, T. I., & Reynolds, M. (2019). Relational positionality and a learning disposition: Shifting the conversation. *International Education Journal: Comparative Perspectives, 18*(2), 11–25.

Hourigan, M. (2019). *What is a keynote speaker, really?* MikeHourigan https://www.mikehourigan.com/keynote-speaker-really/

Ketokivi, K. (2010). *The relational self, the social bond and the dynamics of personal relationships: A sociological analysis* (Vol. 263). Department of Social Research, University of Helsinki, Finland.

Leadership Pacific. (2019). *2019 Conference.* http://leadershippacific.com/

Marshall, L. (2011). *What is a key note.* Quick and Dirty Tips. https://www.quickanddirtytips.com/business-career/public-speaking/what-is-a-keynote-speech

Merriam, S. B., Johnson-Bailey, J., Lee, M.-Y., Kee, Y., Ntseane, G., & Muhamad, M. (2001). Power and positionality: Negotiating insider/outsider status within and across cultures. *International Journal of Lifelong Education, 20*(5), 405–416.

Mila-Schaaf, K. (2006). Va-centred social work: Possibilities for a Pacific approach to social work practice. *Social Work Review, 18*(1), 8–13.

Oc, B., & Bashshur, M. R. (2013). Followership, leadership and social influence. *The Leadership Quarterly, 24*(6), 919–934.

Rutherford, G. (2011). Peeling the layers: A grounded theory of interprofessional co-learning with residents of a homeless shelter. *Journal of Interprofessional Care, 25*(5), 352–358.

Sanga, K., & Reynolds, M. (2019). Melanesian tok stori in leadership development: Ontological and relational implications for donor-funded programmes in the Western Pacific. *International Education Journal: Comparative Perspectives, 17*(4), 11–26.

Sanga, K., Reynolds, M., Paulsen, I., Spratt, R., & Maneipuri, J. (2018). A tok stori about tok stori: Melanesian relationality in action as research, leadership and scholarship. *Global Comparative Education, 2*(1), 3–19. https://www.theworldcouncil.net/uploads/8/6/2/1/86214440/gce_wccesjournal_vol2-no1.pdf

Singleton, K. (n.d.). *Musical investigation.* http://isicathamiyambubevsmoderndayacappella.blogspot.com/p/modern-day-cappella-background.html

Strachan, J., Akao, S., Kilavanwa, B., & Warsal, D. (2010). You have to be a servant of all: Melanesian women's educational leadership experiences. *School Leadership and Management, 30*(1), 65–76.

Thornberg, R. (2012). Informed grounded theory. *Scandinavian Journal of Educational Research, 56*(3), 243–259.

Uhl-Bien, M., Riggio, R. E., Lowe, K. B., & Carsten, M. K. (2014). Followership theory: A review and research agenda. *The Leadership Quarterly, 25*(1), 83–104.

Vaai, U. L., & Nabobo-Baba, U. (Eds.). (2017). *The Relational Self*. Suva, Fiji: University of the South Pacific; Pacific Theological College.

Vaioleti, T. (2006). Talanoa research methodology: A developing position on Pacific research. *Waikato Journal of Education, 12*, 21–34.

Vaka, S., Brannelly, T., & Huntington, A. (2016). Getting to the heart of the story: Using Talanoa to explore Pacific mental health. *Issues in Mental Health Nursing, 37*(8), 537–544.

Vella, L., & Maebuta, J. (2018). Building national unity, reconciliation and peace in the Solomon Islands: The missing link. In B. Jenkins, D. B. Subedi, & K. Jenkins (Eds.), *Reconciliation in Conflict-Affected Communities* (pp. 57–74). Springer.

Wolfgramm-Foliaki, E., Smith, H., & Hattori, M. (2018). *Indigenous methodologies: Charting our collective journey. A talanoa panel*. Paper presented at the (Re) Mapping Indigenous & Settler Geographies in the Pacific conference, Mānoa, HI. https://researchspace.auckland.ac.nz/handle/2292/45503

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# Exploring understandings of Pacific values in New Zealand educational contexts: Similarities and differences among perceptions

**Robin Averill**
Te Herenga Waka - Victoria University of Wellington, NZ: *robin.averill@vuw.ac.nz*
**Ali Glasgow**
Te Herenga Waka - Victoria University of Wellington, NZ: *ali.glasgow@vuw.ac.nz*
**Fuapepe Rimoni**
Te Herenga Waka - Victoria University of Wellington, NZ: *fuapepe.rimoni@vuw.ac.nz*

*Case studies exploring how educational policies can help teachers serve learners disadvantaged through cultural marginalization are urgently needed to inform education systems internationally. The study reported here explored perceptions of Pacific cultural values at the heart of education policy in New Zealand that were intended to improve opportunities of learners with Pacific heritage. Participants included early childhood, primary, secondary, and tertiary teachers of Pacific and non-Pacific heritage. Data included interviews and teaching observations. Results indicate that the Pacific values can be more deeply felt, understood, and enacted by Pacific teachers than their non-Pacific counterparts. Results are discussed in relation to tenets of culturally sustaining pedagogy and aspects of the Pacific-based* Fonofale *model. Implications of this work include that initial and in-service teacher education must assist teachers to develop working understandings of values as they are felt and experienced by policy target groups. This study contributes to the literature by discussing how a culturally-embedded model can be a useful tool towards ensuring teachers can understand cultural nuances inherent within educational policy and align their practice with these.*

*Keywords: policy; cultural values; Pacific nations; teacher perspectives; initial teacher education; teacher professional development*

## INTRODUCTION

Quality education is essential for ensuring all learners enjoy achievement that maximizes their study and life opportunities. Enhancing the educational experiences of learners susceptible to marginalization because their cultural heritage differs from that of the dominant cultural group is the focus of educational policy initiatives in many countries (e.g., Australia, Canada, United States). Common challenges to implementation of such policies include complexities of learners' lives, widespread lack

of relevant cultural knowledge among many teachers, historically-bound educational systems and processes, and conflicting understandings and priorities amongst stakeholders (Baeza, 2019; Hynds et al., 2015; Riddle, 2019). In New Zealand, education policy highlights the centrality for Pacific learners of a collection of Pacific[1] values (Ministry of Education, 2013, 2018). For example, *Tapasā: Cultural competencies framework for teachers of Pacific learners* (Ministry of Education, 2018) describes that educational success for Pacific learners:

> [I]s achieved when teachers recognise and build on what Pasifika learners, their parents, families, and communities already understand, value and what they know; and integrate those understandings, values and knowledge into their planning and teaching practices. (p. 3)

While the idea of generic values being put forward as important across New Zealand's Pacific groups may be debated, understanding the breadth of significance and interpretation of the values presented in policy documents is important to inform implementation and further policy development. To date, however, as in many international contexts, the research and guidance necessary for informing educators regarding how they can strongly demonstrate such policy is limited. Research is needed to help inform policy implementation and teacher practice to ensure those working in educational contexts can, for example, "celebrate, develop and support the lives of Pacific peoples as both unique and connected wherever they are" (Sanga & Reynolds, 2017, p. 202). In this article, we describe our study which explored educator perceptions of Pacific cultural values, offer findings in relation to how teachers can work towards ensuring they can celebrate, develop, and support the lives of Pacific learners, and draw conclusions relevant to other countries with policies designed to enhance practice for culturally marginalized learners.

We describe the context of, rationale for, and nature of our study (Averill & Rimoni, 2019; Rimoni & Averill, 2019), linking to international literature focussing on the implementation of culturally sustaining practice. We provide an overview of our results showing how the Pacific values were interpreted similarly and differently by participants with and without Pacific heritage (referred to in this article as "Pacific" and "non-Pacific"). We discuss examples from the data which show how the Pacific values can be enacted and nurtured in culturally sustaining ways in early childhood, primary, secondary, and tertiary learning settings. We finish with a discussion of implications of this work for New Zealand and international contexts.

## The New Zealand context

Great diversity exists across New Zealand's Pacific population, with some New Zealand people with Pacific heritage having lived in New Zealand for many generations and others of families who have recently migrated. Two thirds of New Zealand's Pacific population are New Zealand born (Statistics New Zealand, 2014). Having migrated

[1] The term 'Pasifika' is used by the New Zealand Ministry of Education "to categorise trans-culturally diverse peoples from the Pacific regions who now live in New Zealand but continue to have family and cultural connections to Pacific Island nations. Pasifika identify themselves with the islands and cultures of Samoa, Tonga, Cook Islands, Fiji, Niue, Tokelau, Tuvalu, and other Pasifika heritages" (Ministry of Education, 2018, p. 5). In this article, we use the term "Pasifika" as suitable for quotes and as it has been used by others whose work we are referring to. Otherwise, we use the term "Pacific" to describe those in New Zealand with heritage from these Pacific countries.

from countries of the South Pacific, the New Zealand Pacific population include people of Samoan, Cook Island Māori, Tongan, Niuean, Fijian, Tokelauan, and Tuvaluan heritage.

There is disparity across all of New Zealand's educational sectors regarding the proportions of learners and educators who have Pacific heritage. For example, across the New Zealand primary and secondary school sectors, over three times the number of learners have Pacific heritage than teachers (Education Counts, 2019; Education Review Office, n.d.). Such statistics indicate only a broad overview, with Pacific learners' experiences of being taught by people with Pacific heritage highly variable. In the early childhood sector, typically everyone involved in Pacific language nests—learners, teachers, and families—have Pacific heritage, while Pacific learners in other early childhood contexts may not experience teachers with Pacific heritage at all in their early childhood education. Pacific learners may or may not be taught by teachers with Pacific heritage within their schooling, and in some tertiary contexts, some Pacific learners may never be taught by lecturers with Pacific heritage.

The early childhood and school curricula are intended to reflect New Zealand's cultural diversity and to value the histories and traditions of all New Zealanders (Ministry of Education, 2007, 2017). For example, the early childhood curriculum, *Te Whāriki,* is intended to support:

> [C]hildren from all backgrounds to grow up strong in identity, language and culture. In this context, Te Whāriki specifically acknowledges the educational aspirations of Pasifika [New Zealand Pacific] peoples, who derive their identities from Pacific Island nations. (Ministry of Education, 2017, p. 7)

Many New Zealand tertiary institutions also strive to reflect, support, and show they value Pacific students and their cultures towards ensuring learners with Pacific heritage feel welcome, that they belong, and that the institution is a place where they can succeed personally and academically (e.g., Victoria University of Wellington, n.d.). However, despite these emphases on attention to Pacific learners and their cultures across educational sectors, long-standing disparity in educational experience and achievement continues between New Zealand students of Pacific and non-Pacific heritage (e.g., Caygill et al., 2016; Glasgow & Rameka, 2017; Mara, 2017; New Zealand Qualifications Authority, 2019), demonstrating the urgency for improvement in all teachers' understandings of how to maximize educational opportunities for Pacific learners.

Targeted within early childhood, primary, and secondary school contexts, the *Pasifika education plan* (Ministry of Education, 2013) and *Tapasā: Cultural competencies framework for teachers of Pacific learners* (Ministry of Education, 2018) are intended to enhance educational opportunities for Pacific learners by supporting non-Pacific teachers "to engage with Pacific learners in culturally responsive ways" (p. 1). Central to these policy documents, and to the 'Pasifika Success Compass' (Ministry of Education, 2018, p. 4) are values stated as important across Pacific groups: respect, service, leadership, family, reciprocal relationships, inclusion, belonging, spirituality, and love. Teachers are expected to reflect "the importance of retention and transmission of Pacific identities, languages and cultural values" (Ministry of Education, 2018, p. 10) in their teaching. While the policy documents encourage readers to acknowledge differences that exist amongst Pacific heritage groups, explanation regarding how these

differing groups may perceive the values is not included. Furthermore, implementation of education policy intended to reduce educational inequities can be challenging in itself, particularly when the ethnicities of teachers and learners are poorly matched (e.g., Hynds et al., 2015). While policy requirements can increase teachers' knowledge of specific cultural groups and their expectations of needing to teach in ways responsive to this knowledge, the diversity across such groups and varying quality of professional development programmes can limit teachers' capabilities and understanding of how to effectively and suitably teach specific learner groups (Baeza, 2019). In addition, with the values stated in English in the policy documents, it is possible that non-Pacific teachers may misinterpret or underestimate the meanings held of the values by Pacific people.

## Education policy and culturally sustaining teaching

Culturally sustaining practices (Paris, 2012) and asset-based approaches (Celedón-Pattichis et al., 2018; Reynolds, 2018) are advocated towards improving the teaching of learners of groups currently underserved in educational settings. Culturally sustaining pedagogical practices are those that can foster, perpetuate, and sustain "linguistic, literate, and cultural pluralism" (Paris, 2012, p. 93) within educational contexts. Asset-based approaches are based on the belief that students', families', and communities' ways of knowing and being are intellectual resources that can contribute greatly to teaching and learning (Civil, 2017). Approaches such as these are intended to enrich learners' feelings of engagement with their cultural heritage by ensuring the knowledge, values, and perspectives associated with students' heritage cultures are strongly reflected within teaching practices and the taught curriculum. To teach in these ways in relation to Pacific heritages, New Zealand teachers need strong knowledge and understanding of Pacific learners (Allen & Robertson, 2009; Chu et al.2013; Ferguson et al., 2008; Rimoni, 2016; Spiller, 2012). However, we know that teachers can be unaware of their students' values and can hold stereotypical views of students who are of ethnic groups other than their own (Rubie-Davies, Hattie, & Hamilton, 2006). In addition, Pacific cultures are dynamic and evolving (Anae, 2001; Coxon & Wendt Samu, 2010; Hunkin-Tuiletufuga, 2001), hence ongoing attention to the development of teacher knowledge and understandings of Pacific cultures is important for ensuring cultural knowledge is current. Although reflecting Pacific values in classroom practice can help maximize Pacific learner success (Hunter et al., 2016), Pacific values are "rarely identified by schools as valuable in the classroom context" (Fa'avae, 2017, p. 51). In summary, while the nature of pedagogies and behaviours associated with culturally sustaining practice are clear, teachers may not know about or recognize Pacific values; they may see them as generic rather than nuanced, they may not realize that the values can change over time, or they may either not appreciate the values or not convey to others the appreciation they do have for them.

## The *Fonofale* model

Used in relation to Pacific people, Pulotu-Endemann's (1998/2001) *Fonofale* represents health matters metaphorically as a *fale*, a traditional Samoan house. The structures that comprise the *fale* represent factors important for the overall health of a Pacific person. The *Fonofale* model was chosen for use in our study as it is a traditionally-based Indigenous model in which the ideas and metaphorical setting align well with the values from the contemporary New Zealand-based *Tapasā* compass (Ministry of Education,

2018) that we wanted to explore. A Samoan *fale* is a home, a community, or church—a safe environment that provides a sense of belonging, leadership, and spirituality. From this structure, the *fale* serves to be the place that helps instil values, such as respect, reciprocity, and other inclusive values. Without a strong foundation, the family or community will not function morally and inclusively (Faitaua, 2014). The foundation of the *fale* represents family, the foundation for people of all Pacific cultures. The roof represents beliefs and cultural values, which are considered to be the shelter for one's life. The four posts between the foundation and roof are used to represent the spiritual, physical, mental, and other aspects of life, that together form the connections between family and culture. Surrounding the *fale* is a cocoon that represents the environment, time, and context, all of which can have direct or indirect influence on an individual (Pulotu-Endemann et al., 1995). The decision to use the *Fonofale* model was affirmed as we proceeded with our data collection, in that the values inherent in the *fale* were being expressed by our Pacific and non-Pacific participants to varying degrees. Due recognition was accorded, however, that while the model captures one epistemological worldview, it may not necessarily encompass the range or totality of worldviews of the two non-Samoan researchers nor that of Pacific participants. Nevertheless, it was deemed to provide a strong metaphor that shows sufficient alignment with the research focus.

In summary, disparity between the proportions of learners and educators who have Pacific heritage exists in most New Zealand educational contexts, and research indicates that many New Zealand educators, as for New Zealand society more widely, lack deep understanding of Pacific cultural knowledge. The *Fonofale* model provides a culturally-located lens for considering our findings. Across early childhood to tertiary contexts, most New Zealand educational institutions desire or are required to strongly reflect Pacific values towards ensuring comfortable engagement and academic success of Pacific learners. To help inform and enhance teaching of New Zealand Pacific learners, our study explored the research question:

> *What are the similarities and differences between Pacific and non-Pacific educators' perceptions of the Pacific values and the ways in which they demonstrate and nurture these values in their teaching?*

Next, we describe the study, outline selected results, and then discuss implications of this work for educators working within and outside of New Zealand.

## THE STUDY

We explored perceptions of the Pacific values of educators across early childhood, primary, secondary, and tertiary contexts. The values of respect, leadership, and service were explored in the first year of the study, and family, spirituality, and reciprocal relationships in the second year. Pasifika education research guidelines (Anae et al., 2001) were used to inform the study design. For example, researchers negotiated data gathering times and locations with participants, drew from established relationships, and were flexible and ready to compromise. The three researchers comprised the research team, one each of Samoan, Kuki Airani/Tahiti, and New Zealand European heritage. Full ethics approval was gained for this study and all participants gave full informed consent.

Data was collected from a total of 32 Pacific and nine non-Pacific teachers across three early childhood centres (two language nests and one English-medium setting), ten English-medium schools (seven primary and three secondary), and one large tertiary institution. There were varied proportions of Pacific learners and teachers across the data gathering settings, reflecting the diversity of proportions of Pacific learners across learning institutions in New Zealand. Study participants were identified by the researchers or the institution leader as educators who were making a positive difference for Pacific learners. The heritage Pacific Nations of study participants were roughly consistent with New Zealand population proportions.

Semi-structured interviews were used to explore what each of the values meant to participants and how they believed they demonstrated and nurtured the values in their teaching. Using observation schedules with key indicators drawn from consultation based on elements from a wide range of Pacific and non-Pacific based literature, enactment of the values in teaching and other educator interactions with students was recorded across several lessons of each teacher. Interviews were mostly carried out prior to teaching observations to establish connections and comfort between the educator and researcher/s and to enable observations to be informed by understanding the participant's perspectives. In other cases, interviewers drew from the teaching observations during the interview.

Interviews were carried out with three early childhood leaders (Pacific), eight early childhood teachers (Pacific), one school principal (non-Pacific), 12 primary teachers (five Pacific, seven non-Pacific), ten secondary school teachers (five Pacific, five non-Pacific), one teacher aide (non-Pacific), and three university lecturers (two Pacific, one non-Pacific). All interviews were transcribed. Heritage ethnicities of Pacific participants included Cook Islands, Samoa, Tahiti, and Tokelau. Data were gathered by two researchers together in one school and individually in the other settings. Analysis was carried out by the researchers independently reading and rereading the interview and observation data and then together determining key themes.

## Results

To give a broad overview of participants' perceptions and actions, the results are discussed by education sector with indicative examples from each data set for one of the focus values. Themes across sectors are then discussed. Themes were drawn considering both interview and observational data. Results are discussed in light of the ideas shared and how these were shared. It is possible that the communication styles of Pacific and non-Pacific participants differed, particularly in relation to the expression of emotions.

### Early childhood educators: The cultural value of spirituality

All early childhood teachers interviewed were of Pacific heritage. Spirituality is the focus value of this section as it was viewed by the early childhood Pacific participants as a key value in the lives of Pacific people. Toso (2011) explains that spirituality is an important concept for understanding ways that Samoan children and adults relate to each other. While its expression may vary between and within Pacific cultures, spirituality is a widely held, cross-cultural value across the Pacific. Spirituality contributes to the total well-being of the Pacific person. Spirituality is a value promoted

and espoused within *Te Whāriki,* the early childhood curriculum (Ministry of Education, 2017), which acknowledges the centrality of *Te Taha Wairua*, the spiritual dimension, in the development of the whole child (p. 67).

An early childhood teacher in a Cook Islands Pacific language nest described the prominent place of spirituality in Pacific lives:

> Spirituality is built into all parts of our lives. We foster the importance of religious Christian practice in our early childhood programme as a collective activity. At our group sessions we build in spiritual principles and rituals such as Pure (Prayers) and Himene (Religious hymns). In this, we remember our ancestors who have passed. It also builds in our children a strong sense of cultural identity and belonging.

A Tokelauan language nest teacher explained her view that promoting spiritual values and beliefs dovetailed with traditional cultural practices such as *Inati* (a Tokelauan practice of sharing resources and caring for others in the community):

> It is how we were brought up – to look after our fanau and to nourish our children's spirituality. We build spirituality into our daily programme beginning with a karakia (prayer). It doesn't feel complete [starting our day] without it. Our children attend funerals at the hall next door. We go to pay our respects.

In these ways children are learning traditional religious rites and practices which may then be "played out" in their learning environments. A Tokelauan teacher described how children demonstrate their understandings of spirituality and religious practice through their early childhood play based programme:

> After one funeral some of the children [in their play] set up an altar on the mat and simulated the funeral ritual of saying farewell to the deceased community member. I felt quite emotional when I saw this as it is an important part of their culture and practice. Our children were demonstrating their cultural and spiritual understandings [independently, without adult intervention].

A Samoan teacher within an English-medium setting noted that as the head teacher she fostered spirituality within the centre's programme. She noted that although the centre was "Western", she built in Pacific spiritual practices:

> We begin with opening prayers and we always bless the food. We foster the importance of attending church and we prepare children for White Sunday church services.

This teacher noted that although some of the parents were accepting of spirituality and of saying *lotu* (prayers), others, particularly the non-Pacific teachers and parents, were not as comfortable with expressions of spirituality. She described that this group were concerned about their lack of knowledge and that they "were worried about if they didn't do it right".

The importance of ensuring that children are well equipped with cultural, spiritual, and religious values before they leave the early childhood setting for school was voiced by a Tokelauan teacher. This teacher expressed concern that children's spiritual nurturing may not continue through the English-medium education system, and sometimes felt concerned about children leaving the language nest and transitioning to school:

> If we don't plant the foundations [of spirituality] children will miss out. Sometimes I don't feel safe to let them go.

A Samoan teacher in an English-medium centre summed up the feelings of many by saying that, for her, having a strong spiritual belief and value base gave her the "heart to teach" both Pacific and non-Pacific children.

**Primary educators: The cultural value of service**

Our interview data indicated that service is a value very important and always relevant to many Pacific people, including Pacific teachers, learners, and their families. Pacific and non-Pacific teachers held some similar beliefs about the importance of service:

> [Service is] the love for the kids and their learning . . . that's the biggest thing for me. You know, providing a service that scaffolds these kids' learning to be successful in life . . . if they make progress and succeed it will be a big success for them, the fanau, the church, because we are not individuals, we represent the church, the community, the village. (Pacific primary educator)

> If I didn't value service, I wouldn't be in this role. I'm a servant to [the students] . . . I see [service] is one of the biggest values I'd like to see developed with them, and if I'm not demonstrating it, then I can't really expect it. (Non-Pacific primary educator)

The connection of service to Pacific students' learning and to being successful were important for Pacific and non-Pacific teachers. Providing Pacific learners with the responsibility of and opportunity to give service through helping others was discussed by both Pacific and non-Pacific teachers as helping Pacific students to be and feel valued. More frequent opportunities for students to take on service type roles were noted in Pacific teachers' classrooms than those of non-Pacific teachers.

Teachers all shared their understanding of service as giving to others, and that their roles as teachers included serving learners by taking responsibility for leading and managing the learners and learning in their classrooms. Pacific teachers more often spoke of this role as one that extends to encompass involvement of learners and parents. For example, one Pacific teacher explained that ensuring students were ready to learn within holistic three-way relationships (teacher, learner, parents) was involved in how she interpreted service:

> Service – is a three-way job, it's a service to the students, with the parents and the teachers, all three aspects connect to the students being ready and valued. We can't do this without the parents and we can't do it without the students (Pacific primary educator)

Service was demonstrated by the primary school teachers through providing support, opportunity, and space for Pacific students to develop and grow as learners and people and to be of service to their peers. One teacher discussed that providing service enabled her to learn about her learners and their lives:

> Acts of service (or a serving orientation to life) take you outside yourself and your own little sphere to new communities and people who can teach you much about yourself, as well as about life as you do not know it. (Non-Pacific primary educator)

Pacific teachers discussed service more widely and broadly than their non-Pacific counterparts in relation to their roles as teacher and within their family and wider community groups. Such explanations and our classroom observation data showed Pacific teachers being more likely than non-Pacific teachers to strongly and consistently reflect broad, ingrained, Pacific community-held considerations of service in their teaching.

**Secondary educators: The cultural value of family**

Family also emerged from interview data as vitally important to Pacific teachers. One Pacific secondary educator shared that to her and many Pacific people, the value of family is the most important thing:

> I would say family is probably more important than anything else, for me personally. There is this kind of – it is not really a saying, but a thing that some Pacific Islanders say – and it is like "family to loyalty". It means "family to the death" . . . what it means is that they would choose to protect and uphold and maintain that family kind of unit above other things. (Pacific secondary educator)

Another Pacific secondary educator spoke similarly about the value of family to her and her family:

> To me it's everything, it's at the core with my faith. Everything I do is for the family; family is at the forefront and the centre of everything. My parents would say "you carry your family's name everywhere you go and so your actions affect and come back to the family". It is almost like a way to try and keep you on the straight and narrow, not to go out of those boundaries and not to bring shame or give your family a bad reputation. (Pacific secondary educator)

These educators talked of the role families hold in relation to the success of Pacific students, sharing that Pacific students feel that their success is to make their families proud, rather than seeing their success for themselves personally. Families of Pacific students and Pacific educators demonstrated the value of family and personal achievements being family achievements by attending and helping with school events, such as a Pacific Success evening. Observations showed that in discussing learning and behaviour with Pacific students, Pacific educators draw on students' pride in who they are and their families, such as by asking them questions like: "what would your Mum think?".

In contrast, non-Pacific educators spoke of the importance to them of the value of family in personal rather than community ways, and were less emphatic than their Pacific counterparts:

> I know for me; family are the people who you are close to – either through choice or through blood. (Non-Pacific secondary educator)

> There is the element of respect there and family is really important, and we do things for one another and we care about one another and we want the best for one another, and we pitch in and help. (Non-Pacific secondary educator)

Both Pacific and non-Pacific educators likened their teaching practice and interactions to family experiences; one non-Pacific educator reporting drawing from the ways his parents had held high expectations for and supported his own learning in his work. Another non-Pacific educator explained that "we look at our kids individually like you

do in family, we are all going one place together and we are not going to leave anyone behind".

**Tertiary educators: The cultural value of respect**

Respect has emerged from many studies as an essential value to Pacific learners (e.g., Ferguson et al., 2008; Spiller, 2012). While all tertiary educators in the study felt strongly about the importance of respect, overall, the Pacific tertiary educators spoke more deeply and broadly of respect and taught in ways reflecting respect more deeply than the non-Pacific educator. One Pacific tertiary educator described the Pacific value of respect as including the:

> [N]otion of empathy and looking at [situations] from the other person's perspective . . . considering the wealth of knowledge, and strengths and skills that this person can bring, and this community can bring . . . [teacher] humility is an important starting point in terms of that respectful relationship. (Pacific tertiary educator)

This educator explained that to her, respect demonstrated in practice will:

> [E]ngender respect from the community, and [provide] that sense of "we're valued, we feel valued, you value us, and our children aren't going to lose their sense of identity, they're going to retain who they are, and be proud of it as well . . . showing that we really want to ensure that children do retain that strong sense of identity, those Pacific languages and cultural practices. (Pacific tertiary educator)

This educator's teaching strongly demonstrated and highlighted the importance of the value of respect. She incorporated Pacific greetings and protocols, deliberately and specifically focussed on explaining the importance of relationships for developing effective communication, and explained culturally-linked examples of how respect can be shown (e.g., how facial expressions and gestures may be interpreted differently by different groups). This educator used students' names, encouraged respectful behaviours in the students (e.g., emphasized the important of correct pronunciation of names), and helped them to consider the feelings of people from cultural groups other than their own within lecture content. Another Pacific tertiary educator discussed her ideas of respect having come directly from her upbringing over many years of being shown and told the family's expected ways of being and interacting with others. She discussed demonstrating respect by prioritizing relationships with learners over content, especially in initial lectures, and using interactive teaching strategies and humour to ensure students were comfortable to participate and learn.

The non-Pacific tertiary educator explained that to demonstrate respect in her teaching she "would know every single [Pacific student] by name, follow up on their lives, ask them what schools they were at", and work to make deliberate connections with them by identifying Pacific people she and they may know in common. She described how her knowledge of Pacific Nations, priorities, and issues enabled her to bring Pacific-based examples into her teaching and to be empathetic to factors affecting her students' learning. In her teaching, this educator demonstrated respect by greeting students and introducing herself personally and professionally in relation to the lecture content focus. She expected, encouraged, and supported students to contribute and interact with one another in pairs, small groups, and with the wider lecture group. She used positive body language, listened intently to student ideas, and acknowledged factors potentially impacting on their learning (e.g., financial situation, wellbeing, time management).

### Themes across sectors

The results above give examples of participants' views and how they teach. There were similarities and differences in the ways that Pacific and non-Pacific participants described their feelings. All responses showed that the values were important to participants and felt important for them to demonstrate and nurture. Pacific participants were often more emotional and emphatic than non-Pacific participants in the way that they spoke about specific values (e.g., respect, family). For example, several Pacific participants cried while describing how strongly they felt specific values were to them, with their tears sometimes linked to their concerns about negative experiences of Pacific learners, and sometimes to the deep connections they have with Pacific family and community members. Pacific teachers were more likely than non-Pacific participants to emphasize how a value was also of strong importance to their family and community, and were more likely to affirm the importance of our study for helping to inform New Zealand educators, indicating to us their concerns that non-Pacific teachers do not fully understand Pacific perceptions of the values.

## DISCUSSION

Our findings demonstrate that universal views of the values were not held within or across the Pacific and non-Pacific participants. However, findings show that while some similarities exist, the values are often more deeply expressed and more deeply demonstrated in practice by Pacific educators. Pacific educators were more likely to include discussion of thoughts and feelings of Pacific learners and community than non-Pacific educators. They were also more likely to discuss implications for learners of responsiveness to the values than their non-Pacific counterparts, whose responses in the main were about teacher actions.

No participants questioned the values explored, either as values important to people with Pacific heritage or as potentially having different meanings for people of different Pacific heritages. This result suggested to us that either participants were aware of and comfortable with the values as given in the policy documents, or that they were unaware of these but comfortable with them as important for Pacific people in general. Differences in descriptions and actions between Pacific and non-Pacific educators may be linked to differences in communication styles and norms between the two groups. However, our findings suggest that Pacific learners taught by non-Pacific educators need to navigate educational settings that may not reflect the Pacific values as strongly as they experience them outside formal education.

We surmise that the commonality of the English language across policy, researchers, and the research settings may have led Pacific participants to use English terms for the values rather than terms in their heritage language. Our findings indicate that Pacific learners would benefit from stakeholders in their educational setting developing shared understandings of the values most important to the setting's Pacific community. Further research would be useful to explore how shared understandings of values can be generated and strongly reflected in educational settings, including the extent to which using Pacific language terms for the values could assist.

Our findings highlight the importance of interrogating ideas from contemporary academic context-based Western models (e.g., the *Tapasā* compass, Ministry of Education, 2018) using Indigenous tools. We found that Pacific teachers' responses and teaching was much more aligned to the metaphorical, holistic, and integrated perspectives of the *Fonofale* model (Pulotu-Endemann, 1998/2001) than those of non-Pacific teachers, and than afforded by expression of the values in *Tapasā* (Ministry of Education, 2018). Our data provides illustrative examples from practice of both the *Fonofale* and *Tapasā* models that can assist teachers' work with Pacific learners and their families, and shows that nuance and diversity exist in people's perceptions of key aspects of these.

We have examined perspectives of cultural values—only one aspect of the education policy focussed on Pacific learners (Ministry of Education, 2013, 2018). Considering our results in light of the *Fonofale* model, culturally sustaining pedagogy, and asset-based approaches, our findings indicate there is much work to be done to ensure all New Zealand teachers can implement education policy suitably for Pacific learners.

## CONCLUSION

The Pacific values are fundamental to New Zealand education policy and practice. Our findings indicate that Pacific teacher participants saw Pacific values as vital, always important to and expected of them. We have provided evidence that the values are culturally embedded; understood and enacted differently by New Zealand Pacific and non-Pacific teachers. Improving consistency in interpretation and enactment of the Pacific values is necessary for policy to be implemented and for disconnects between the school and out-of-school lives of Pacific learners to be reduced. Further research could help illuminate similarities, differences, and nuances across perspectives on values important to specific New Zealand Pacific groups.

Our work provides glimpses that can inform teachers, learners, and parents about how the Pacific values can be strongly demonstrated in learning settings. However, further study is needed to explore how best to enhance non-Pacific teachers' understanding and enactment of the Pacific values in ways that enhance learning experiences for Pacific learners and promote Pacific learner achievement.

Internationally, our study indicates that policy intended to improve educational opportunities for marginalized students may be interpreted differently by different readers and stakeholders and that it is important to interrogate such policy using Indigenous tools. Our study design provides a basis for comparing perspectives towards informing policy development and professional development of teachers of learners of cultures other than their own. We believe that understanding and developing teachers' perceptions of values fundamental to how these learners and their families think, feel, and act are essential for implementation of equity-based pedagogies and approaches (e.g., Celedón-Pattichis et al., 2018; Paris, 2012).

Learning institutions have many dimensions of complexity—diverse learners embedded within diverse communities within complex societies. All involved in education are responsible for ensuring learner success, and for doing all they can to celebrate, develop, and support the lives of their learners. We hope our work can contribute to teachers celebrating, developing, and supporting the lives of their Pacific learners, and

marginalized learners more widely, and can inform those responsible for developing and implementing equity-focussed education policy.

**Acknowledgements:** The research team are grateful for an internal research grant from Te Herenga Waka - Victoria University of Wellington which helped fund the research reported in this article.

## REFERENCES

Allen, P., & Robertson, J. (2009). "In order to teach you, I must know you." The Pasifika initiative: A professional development project for teachers. *New Zealand Journal of Educational Studies, 44*(2), 47.

Anae, M. (2001). The new Vikings of the sunrise: New Zealand-borns in the information age. In C. Macpherson, P. Spoonley, & M. Anae (Eds.), *Tangata o Te Moana Nui: The evolving identities of Pacific peoples in Aotearoa/New Zealand* (pp. 101–121). Dunmore Press.

Anae, M., Coxon, E., Mara, D., Wendt-Samu, T., & Finau, C. (2001). *Pasifika education research guidelines.* Wellington: Ministry of Education.

Averill, R., & Rimoni, F. (2019). Policy for enhancing Pasifika learner achievement in New Zealand: Supports and challenges. *Linhas Críticas, 25*, 549–564. htpps://doi.org.10.26512/lc.v25i0.23780

Baeza, A. R. (2019). Teachers' professional standards and Indigenous Education in Australia and Chile. *The International Education Journal: Comparative Perspectives, 18(*3), 14–24.

Caygill, R., Hanlar, V., & Singh, S. (2016). *TIMSS 2014/15: Mathematics Year 9: Trends over 20 years in TIMSS*. Wellington, New Zealand: Ministry of Education.

Celedón-Pattichis, S., Borden, L., Pape, S., Clements, D., Peters, S., Males, J. Chapman, O., & Leonard, J. (2018). Asset-based approaches to equitable education research and practice. *Journal for Research in Mathematics Education, 49*(4), 373–389. https://doi: 10.5951/jresematheduc.49.4.0373

Chu, C., Glasgow, A., Rimoni, F., Hodis, M., & Meyer, L. (2013). *An analysis of recent Pasifika education research literature to inform improved outcomes for Pasifika learners* (Report to the Ministry of Education). Wellington, New Zealand: Ministry of Education.

Civil, M. (2017). Preface. In S. Celedón-Pattichis, D. Y. White, & M. Civil (Eds.), *Access and equity: Promoting high quality mathematics in pre-K–Grade 2* (pp. v–viii). Reston, VA: National Council of Teachers of Mathematics.

Coxon, E. & Wendt Samu T., (2010). Pacific education research: New directions. *MAI Review,* 1–4.

Education Counts. (2019). *Teaching staff: Information on teaching staff in schools from 2004-2017.* Wellington, New Zealand: Ministry of Education.

Education Review Office. (n.d.). *Ethnic diversity in New Zealand state schools*. Wellington, New Zealand.

Fa'avae, D. (2017). Family knowledge and practices useful in Tongan boys' education. *Set: Research Information for Teachers, 2*, 49–56. htpps://doi.org.10.18296/set.0082

Faitaua, A. (2014, October). *Modern learning pedagogy + Modern Pasifika learners = 21st Century Pasifika learners raising a village*. http://blog.core-ed.org/blog/2014/10/modern-learning-pedagogy-modern-pasifika-learners-21st-century-pasifika-learners-raising-a-village.html

Ferguson, P. B., Gorinski, R., Wendt Samu, T. & Mara, D. (2008). *Literature Review on the experiences of Pacific learners in the classroom.* Report for the Ministry of Education. Wellington, New Zealand: Ministry of Education.

Glasgow, A. H., & Rameka, L. (2017). Maori and Pacific infant and toddler cultural pedagogy: Reclaiming a cultural lens. *International Critical Childhood Policy Studies 6*(1), 80–95.

Hunkin-Tuiletufuga, G. (2001). Pasefika languages and Pasefika identities: Contemporary and future challenges. In C. Macpherson, P. Spoonley, & M. Anae (Eds.), *Tangata o te moana nui: The evolving identities of pacific peoples in Aotearoa/New Zealand* (pp. 196–211). Dunmore Press.

Hunter, J., Hunter, R., Bills, T., Cheung, I., Hannant, B., Kritesh, K., & Lachaiya, R. (2016). Developing equity for Pasifika learners within a New Zealand context: Attending to culture and values. *New Zealand Journal of Educational Studies, 51*(2), 197–209. htpps://doi.org.10.1007/s40841-016-0059-7

Hynds, A., Averill, R., Penetito, W., Meyer, L., Hindle, R., & Faircloth, S. (2015). Examining the impediments to indigenous strategy and approaches in mainstream secondary schools. *International Journal of Leadership in Education, 19*(5), 534–556. htpps://doi.org.10.1080/13603124.2015.1051130.

Mara, D. (2017). Voyaging the oceanic terrains: Sustainability from within Pasifika early childhood education. *Waikato Journal of Education: Te Hautaka Matauranga o Waikato, 22* (1), 37–43. htpps://doi.org.10.15663/wje.v22i1.554

Ministry of Education. (2007). *The New Zealand curriculum*. Wellington, New Zealand:.

Ministry of Education. (2013). *Pasifika education plan 2013–2017*. Wellington, New Zealand.

Ministry of Education. (2017). *Te Whariki: He whariki matauranga mo nga mokopuna o Aotearoa.* Wellington, New Zealand.

Ministry of Education. (2018). *Tapasā: Cultural competencies framework for teachers of Pacific learners*. Wellington, New Zealand.

New Zealand Qualifications Authority. (2019). *Annual report on NCEA and New Zealand Scholarship data and statistics 2018.* Wellington, New Zealand.

Paris, D. (2012). Culturally sustaining pedagogy: A needed change in stance, terminology, and practice. *Educational Researcher, 41*(3), 93–97. htpps://doi.org.10.3102/0013189X12441244

Pulotu-Endemann, F. K. (1998/2001). *Pacific mental health services and the workforce: Moving on the blueprint.* Wellington, New Zealand: Ministry of Health.

Pulotu-Endemann, F. K., Crawley, L., & Stanley-Findley, R. T. U. (1995). *Strategic directions for the mental health services of Pacific islands people.* Wellington, New Zealand: Ministry of Health.

Reynolds, M. (2018). They always have my back: A strengths-based approach to understanding the value(s) of Pasifika brotherhoods in education in Aotearoa New Zealand. *International Journal of Multicultural Education, 20*(2), 1–23. htpps://doi.org.10.18251/ijme.v20i2.1515

Riddle, S. (2019). Democracy and education in contemporary local-global contexts. *The International Education Journal: Comparative Perspectives, 18*(1), 1–6.

Rimoni, F. (2016). *Tama Samoa stories: Experiences and perceptions of identity, belonging and future aspirations at secondary school*. (Unpublished PhD thesis). Victoria University of Wellington, New Zealand.

Rimoni, F. & Averill, R. (2019). Respect: A value vital for Pasifika learners. *Set: Research Information for Teachers, 3*, 3–11. htpps://doi.org.10.18296/set.0146

Rubie-Davies, C. M., Hattie, J., & Hamilton, R. (2006). Expecting the best for New Zealand students: Teacher expectations and academic success. *British Journal of Educational Psychology, 76*, 429–444. htpps://doi.org.10.1348/000709905X53589

Sanga, K., & Reynolds, M. (2017). To know more of what it is and what it is not: Pacific research on the move. *Pacific Dynamics: Journal of Interdisciplinary Research, 1*(2), 198–204.

Spiller, L. (2012). "How can we teach them when they won't listen?": How teacher beliefs about Pasifika values and Pasifika ways of learning affect student behaviour and achievement. *Set: Research Information for Teachers, 3*, 58–66.

Statistics New Zealand. (2014). *2013 Census QuickStats about culture and identity*. Wellington, New Zealand.

Toso, V. M. (2011). Reconceptualising spirituality as a philosophy of practice for Pasifika early childhood education in New Zealand: A Samoan perspective. *Pacific-Asian Education, 23*(2) 129–138.

Victoria University of Wellington. (n.d.). *Pasifika at Victoria University of Wellington*. Wellington.

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# The influence of politics in Hong Kong's education system 23 years after its handover from the United Kingdom to China

**Wai-Chung Ho**
Hong Kong Baptist University, HK, China: *tediwch@hkbu.edu.hk*

*This article examines how politics has shaped Hong Kong's education system and the curriculum 23 years after the British handover of Hong Kong to China. Particularly, through the concept of nationalism, the article examines how the education system is being shaped. The article is intended to provide international readers with a perspective of the political and socio-educational dynamics at play in Hong Kong. The central question at issue is: how has political culture and identity been promoted in school education under the framework of "One Country, Two Systems" after the transfer of Hong Kong sovereignty from Britain to China? Two areas—the censorship of curriculum materials and the politicization of nationalism—particularly reflect the influence of power relationships, and the historical and societal pressures on the formation of students' identity in school education.*

*Keywords: political culture; construction of identity; censorship of school education; politicization of school curriculums; Hong Kong*

## INTRODUCTION

The formation of culture, identity, nationhood, and educational curriculum is a dynamic and, at times, contentious process. Culture, in Émile Durkheim's (1995, pp. 231–232) view, is an appealing web of representations, holistically enveloping the vast value, belief, and symbolic systems of a natural collectivity in society (also see Pickering, 2000, pp. 16–17). Durkheim (1964, p. 128) also asserted that every society displays and requires a sense of continuity with the past, and that the past confers identities on individuals and groups to allow us to see collective memory as one of the elementary forms of social life. Halbwachs (1992, p. 38), who accepted Durkheim's critique of philosophy, defined the process of shared recollection of the past as "collective memories" in social processes and showed how shared memories can be effective markers of social differentiation.

The core components of nationalism prior to the early 20th century included language, ethnicity, religion, and territory. Bendix (1964) noted that such a version of nationalism was founded on an ideology of inclusion and was part of nation-state building. As argued by Hobsbawm (1991, 1992a, 1992b) and other scholars on nationalism (e.g.,

Gellner, 1983; Greenfeld, 1992), "old" nationalism was fundamentally a nationalism of state patriotism. Along this line, national education systems attempted to establish a monolinguistic culture to foster social solidarity and national cohesion around an internally homogenized population (see Durkheim, 1974; Green, 2013; Weber, 1976). The leading variance between "old" and "new" nationalism is that "today nationalism has lost its attachment with citizenship and has become a nationalism of exclusion", and citizenship has become de-territorialized and pieced into the disparate discourses of participation, responsibility, rights, and identity (Delanty, 2000, p. 96). According to Bauman (1992), who is viewed as one of the few social theorists to fuse an analysis of the postmodern condition in postmodern sociology between the late 1980s and early 1990s, nationalism comprises an ambiguity that stems from the "interplay of inclusive and exclusive tendencies" and needs as much assent in the identification of the national-self as the national-other (pp. 683–684).

Nationalism is a strategically assembled illusion that necessarily requires a "programme of unification and a postulate of homogeneity" (Bauman, 1992, p. 683). In the beginning of the 2000s, Bauman (2000) turned away from "postmodernism" to redirect a theory of "liquid modernity" in which the existence of identity is only applicable to a modern society that is "liquid"; that is, always changing and transforming (also see Bauman, 2001). Huntington (1996) believed that the age of ideology had ended and the world had reverted to a normal state of affairs characterized by cultural conflict. Functionally, national identity is the "process whereby a nation [is] reconstructed over time" (Zimmer, 2003, p. 173); Anderson (1991) and Gellner (1983) have defined identity as "imagined" and "invented" in a neutral and descriptive manner, respectively. These valuable contributions to our understanding of how nation-states use culture and identity to deploy power and politics have been shaped and organized within diverse systems of production, reproduction, consumption, and distribution.

In sociology, power is considered a relational concept. The play of power is inherent in social relationships as well as in the education system. Foucault's theory of disciplinary power (1977) and Bourdieu's theory of symbolic power (1979) are among the most innovative efforts in recent social thought to explore the dynamics of power in society. Foucault (1980) adopted the term "power-knowledge" (French: *le savoir-pouvoir*) to signify that power is constituted through accepted forms of knowledge and defined through as a continuous discourse, never fixed but always changing relative to its context. Aronowitz and Giroux (1993, p. 83) observed that, in Gramsci's (1988) view, "[t]he production of knowledge is linked to the political sphere and becomes a central element in the state's construction of power". Thus, they considered social control not only an instance of domination but also a form of emancipatory practice.

For the last four decades, Michael Apple has explored and articulated the relationship between knowledge, teaching, and power in education, stating that:

> Education is deeply implicated in the politics of culture. The curriculum is never a neutral assemblage of knowledge, somehow appearing in the texts and classrooms of a nation. It is always part of a selective tradition, someone's selection, some group's vision of legitimate knowledge. It is produced out of the cultural, political, and economic conflicts, tensions, and compromises that organize and disorganize a people. (Apple, 1993, p. 1)

The process of change in the meaning of knowledge is as diverse as the form of government and people being governed; it is at this juncture where power, culture, and learning experience come together to produce particular identities in education. Individuals understand the interplay between cultural and historical contexts and their subjective experiences in relation to belongingness and nationality as operating within "the realm of primordial being" (Gilroy, 1997, p. 310). It is in this context that such perspectives are not only value-laden but also exhibit the particular relationships of power and knowledge formations. In other words, the production of knowledge serves the interest of power in social institutions. With regard to the nature of knowledge production, social control, and political institutions in modern societies, this process can be interpreted as teaching school students how to follow rules and obey the authorities and authority figures. This can be seen in how the political dimension of education is regulated by power relationships and what particular forms of knowledge in school are regarded as "official" (see Apple, 1993, 2012). In his book *Can education change society?* Apple (2012) argued that struggle and resistance are both always present and always active in education policies and practices in contemporary education.

## THEME OF THE STUDY

In the past few decades, Hong Kong's (HK) political activism has been influenced by the unique characteristics of HK and its relationships with the British Colonial Government and the People's Republic of China (PRC). China's civil wars between 1945 and 1949, the 1949 takeover of China by the Chinese Communists, and China's Cultural Revolution (1967–1977) precipitated a huge influx of Mainland Chinese refugees into HK. Those born in HK after 1949 have not had first-hand experience of Mainland China until after the Open-Door Policy imposed by Deng Xiaoping (1904–1997) in the late 1970s (see Table 1 for a chronology of major events in HK 1842 and 1997; for details, see Carroll, 2007; Tsang, 2004).

During the British colonial period (1898–1997, see Table 1), separation from Mainland China allowed HK people to develop a political culture and identity of their own. The image of such separation of HK's identity was articulated in popular culture by projecting a distinct "Hong Kong way of life" (Fung, 2004, p. 401) and by the spread of the term "Hong Kong person" (Ma, 1999, p. 13). HK's mass media (particularly film and television) contributed to the articulation of this separate local identity by particularly focusing on the cultural differences between HK people and the Mainland Chinese (Mathews, Ma, Lui, 2008).

Perhaps the most significant differences between the HK population and that of Mainland China are language and sociocultural identity. The official HK languages are Cantonese and English and for Mainland China it is Putonghua;[1] written Chinese in HK uses traditional characters while that of Mainland China uses simplified characters. Western culture, particularly in the 20th century, has been a significant influence in HK

[1] Indeed, article 9 of the *Basic Law* states that only Chinese and English are HK's official languages. The Civil Service Bureau has also emphasized that Chinese and English are the official languages of HK and is committed to openness and accountability in producing important documents in both languages (Civil Service Bureau, 2020).

but not so much the case in Mainland China, and the Mainland Chinese exhibit a loyalty to the Chinese Communist Party not found in HK.

**Table 1. Chronology of major events in Hong Kong**

| Year | Major events |
|---|---|
| 1842 | The Treaty of Nanking was signed. China ceded the island of Hong Kong to the British after the First Opium War (also known as the Anglo-Chinese War). |
| 1860 | After the Second Opium War (also known as the Second Anglo-Chinese War), the First Convention of Peking (i.e., an agreement between the Chinese Qing Dynasty and the United Kingdom, France, and the Russian Empire) ceded a significant portion of the Kowloon Peninsula to the British. |
| 1898 | The Second Convention of Peking was signed between the Qing Government and the United Kingdom (UK) on 9 June. China leased the New Territories, together with other islands, to the British for 99 years on 1 July. |
| 1937 | With the outbreak of the Sino-Japanese War, Hong Kong became a refuge for thousands of Chinese fleeing Mainland China. |
| 1941 | Japan occupied Hong Kong. The Imperial Japanese occupation of Hong Kong started when the Governor of Hong Kong, Sir Mark Young, surrendered the British Crown colony of Hong Kong to the Japanese Empire on 25 December. |
| 1945 | After three years and eight months under Japanese martial law, the British administration was returned to Hong Kong. |
| 1946 | The UK re-established the civil government. |
| 1949 | Ma Zedong proclaimed the founding of the People's Republic of China (PRC) in the Mainland, and many Chinese (particularly capitalist-leaning Chinese citizens) fled to Hong Kong. |
| 1950s | Hong Kong enjoyed economic revival based on light industries such as textiles. |
| 1967 | Severe riots broke out in Hong Kong that were mainly due to the influence of China's Cultural Revolution. |
| 1982 | The UK started discussing Hong Kong's future status with the PRC. |
| 1984 | The UK and China signed the Joint Declaration on the conditions under which Hong Kong would revert to Chinese rule in 1997. Under the principle of "One Country, Two Systems", Hong Kong would become part of the PRC but retain its capitalist economic system and a partial democratic political system for 50 years after the 1997 handover. |
| 1992 | Chris Patten became the last British Governor of Hong Kong. |
| 1994 | The Legislative Council approved a controversial constitutional reform package proposed by Chris Patten on 29 June. |
| 1997 | Hong Kong was handed back to the PRC after more than 150 years of British control. Tung Chee-hwa, a Shanghai-born Hong Kong businessman and politician, was the first Chief Executive of the Hong Kong Special Administrative Region (HKSAR). |

An April 2016 telephone survey of 722 respondents aged 18 and over conducted by the Hong Kong Institute of Asia-Pacific Studies of The Chinese University of Hong Kong, found that over half the respondents (55%) thought that Putonghua would not replace Cantonese to become the most commonly spoken language in HK, and more than three-fifths (61.45%) expected that simplified Chinese characters would not become more popular than traditional Chinese characters 20 years after the handover.

Relationships between the people in HK and Chinese Mainland authorities have been relatively tense since the beginning of the 2000s. The percentage of HK people who self-identify as Chinese has declined sharply since 2008, while self-identification with HK identity has been on the rise (Public Opinion Programme, 2017). Despite China's growing economic attractiveness, HK students "have a much weaker sociopolitical identity with China than their mainland counterparts", which is the chief source of "their separatist tendencies" (Pang & Jiang, 2019, p. 4). In the last decade, HK has witnessed a rise of social movements based on local identities. These HK identities, tangled with "colonial history and regional geopolitics, is a negotiation between the local, the national, and the global" (Wang, 2019, p. 420).

During the peak of summer in 2019, hundreds of thousands of people in HK demonstrated against a proposed extradition bill that would have granted the Chinese Government the legal means to request the extradition of fugitives in HK.[2] The mass protests from June 2019 to January 2020 were among the largest in HK's history. The ongoing anti-extradition bill protests coincided with the 1 July pro-democracy march in 2019 (1 July is the anniversary of the return of sovereignty of HK to China). Organizers claimed that an estimated 550,000 people showed up to protest, though the police allege the number was only 190,000 (*Hong Kong Free Press*, 2 July 2019). A large number of secondary school and university students formed an anti-government movement (though it was described as "not centrally organized"). The protestors chose the roles they would play in the rally, such as participating on the front line that clashed with the HK police (the *Yung Mo*, "valiant") or being in the group to deliver resources and provide support but not fight with the police (the *Wo Lei Fei*, "peaceful, rational, non-violent") (Pang & Jiang, 2019, p. 479).

The relationship between HK and the Beijing authorities has also become increasingly complicated and continues to evolve. Organizers reported that, on 2 September 2019, 10,000 students from 200 secondary schools did not turn up for the first day of the new school year, with thousands of them rallying in central HK (BBC News, 2 September 2019; South China Morning Post Reporters, 2 September 2019). During the rally, students chanted "Liberate Hong Kong; revolution of our times". The school boycott, co-organized by localist party Demosisto (a pro-democracy youth activist group in HK), was part of a broader anti-government campaign triggered by the extradition bill.

Having been a Hong Kong Special Administrative Region (HKSAR) of the PRC for 23 years, HK's education system faces challenges when attempting to maintain HK national identity while simultaneously adapting to a required new Chinese cultural identity. Because of the 150 years of British colonial rule, HK society has a relatively

[2] On 23 October 2019, Hong Kong's Secretary for Security, John Lee, announced the official withdrawal of the extradition bill.

capitalist culture. Upon reunifications with the motherland in 1997, the context for current education policies is to instil school students with a socialist Chinese cultural identity, therefore, promoting Chinese social cohesion, as is further explored in the following sections.

In the rest of this article, I examine the post-1997 school curriculum with its integration of the principle of "One Country, Two Systems" by drawing attention to the dynamics and the politics of the construction of national identity in HK's school education associated with—though not solely determined by—national education in the last two decades. The sources of data include selected relevant government documents, education policies and curriculums, and curriculum guidelines. The paper reviews broad literature on the political dynamics of educational changes, development, and implementation. The paper concludes by considering some implications of the current school curriculum formation. To begin with, however, the next section discusses the political and cultural contexts in which this study of society and education development in HK takes place.

## THE POLITICS OF CULTURE AND LANGUAGE POLICY ADOPTED IN EDUCATION AFTER 1997

Demonstrations in HK, particularly the 2003 protest,[3] which were clashes over patriotism and Chinese nationalism, have sparked a series of major changes in HK politics and school education (see Fung & Lui, 2017; Morris, 2009). In June 2014, the State Council Information Office of the PRC issued a White Paper entitled *The practice of the "One Country, Two Systems" policy in HKSAR*, which sought to establish Chinese Mainland "comprehensive jurisdiction" over HK. Following this comprehensive and controversial statement, national identity in the HKSAR became a significant issue for the people of HK. In 2014, the Umbrella Movement was formed and localism became the dominant theme in HK identity politics (Chen & Szeto, 2015). At least two major kinds of localism feature and coexist in HK: (1) "one whose logic is based on anti-China blaming of the immigrant", and; (2) "one whose modus operandi is to rebuild local communities" (Chen & Szeto, 2005, p. 436).

There has been much discussion of the concepts of culture, and the meaning of local and national identity in HK's school education before and after the resumption of Chinese sovereignty. As argued by Robert Bauer (an American linguist and a Cantonese expert), "the difference in languages between HK and the mainland, where Putonghua is dominant, [has]served as a very useful barrier to reinforce the boundary that separate[s] the two places" (cited in Chu, 2017, p. 207). The Putonghua-Cantonese and national-local identity struggles were fully reflected in the controversy over the Education

[3] The *Basic Law* is regarded as a "mini-constitution" for the HKSAR and was introduced in 1997 at the handover of HK to China. The *Basic Law* stipulates that the HKSAR would enjoy a high degree of autonomy and that the capitalist system and way of life in HK would remain unchanged for 50 years after 1 July 1997. In September 2002, the HKSAR released its proposal to implement article 23 of the *Basic Law* and introduced the *National Security (Legislative Provisions) Bill* to the Legislative Council in 2003. Following a massive demonstration by HK people on 1 July 2003, the HKSAR Government removed its proposed bill from the legislative programme. The anti-government demonstration held on 1 July 2003 (i.e., the sixth anniversary of the handover from British sovereignty) was regarded as the biggest rally against the enactment of article 23 of the *Basic Law*, since the return of HK to Chinese sovereignty, with a turnout of over 500,000 HK people.

Bureau's (EDB) note about the status of Cantonese in China. This occurred in January 2014, after the EDB posted a note on its language learning support webpage specifying Cantonese as a Chinese dialect and not an official language, resulting in a severe backlash from HK citizens. The note was quickly removed, but not before it triggered a debate about the status of Cantonese in HK, where about 90% of the population are Cantonese speakers. Anti-Putonghua slogans appeared in subsequent demonstrations in HK (for details, see Law, 2019, pp. 146–151). Some of HK's young people have organized groups to protect Cantonese as a mark of their local identity and have denounced Putonghua as their national language and identity. The representative group Societas Linguistica Hongkongensis (SLH) (a volunteer-led activist organization) was established in 2013 to raise alarm bells over Putonghua creeping into HK.

Between October 2017 and February 2018, the Education University's Academy of Hong Kong Studies for the New People's Party surveyed 1,279 students (78.7% born in HK and 20.2% born on the Mainland) attending Grades 10 and 11 in 11 HK secondary schools regarding their HK identity (Yuen, 2018, p. A26). In response to a rating scale of 0 to 10, where 0 = "absolutely incompatible" and 5 = "half-half", 36.6% of the students chose a score of 5, 19.6% chose a score between 1 and 4, and 8.7% chose 0 (Yuen, 2018, p. A26). There was a clear difference between the orientation of students born in HK and those born in the Mainland, with the overall national identity of students born on the Mainland being high. The findings also showed that the respective 29.4% and 58% of those who were born in HK and Mainland China maintained that the identity of HK and Mainland China could be negotiated. The data indicated that the students from Mainland China were generally more open to identity negotiation, while most of the HK students had a stronger sense of local identity. Given the continuing protests, it may seem untimely to discuss HK's identity issue in school education, featuring an identity crisis, with the use of "Kongish", the chanting of slogans, and the singing of the Cantonese song "Glory to Hong Kong" in student protests.

## CENSORSHIP IN THE CURRICULUM

Education can be thought of as a dynamic process that is rooted in sociocultural and political contexts. Schools play an essential role in advancing the political agendas of the government and imposing the dreams of the ruling party (see Cheng & Fell, 2014; Gadir, 2015; Morris & Chan, 1997; Ogunniran, 2020). Schools are important because they make what is considered "official knowledge" available. A mode of censorship in the HK school curriculum has been observed by academics, publishers, and bureaucrats (Vickers & Jones, 2005, p. 182), in that requirements have been made not to confront or offend the Chinese authorities over sensitive issues. For example, terms adopted in the textbooks were altered from "Hong Kong" to "Hong Kong Special Administrative Region" and "Taiwan" to "Taiwan Province". The EDB and its publishers have been urged to produce "appropriate teaching materials" in line with the *Basic Law* to maintain the One-China Policy, and schools are confined to providing prescribed information.

This promotion of a national Chinese identity has been a central component in curriculum development in HK since the island's transfer of sovereignty from the UK to PRC. The HKSAR is now expected (1) to prepare students as citizens of the Chinese

authorities; and (2) to secure stability in its governance. That is, after 1997, the HKSAR Government was expected to abide by the "One Country, Two Systems" policy. As such, textbooks used in HK must be approved by the EDB and be based on their alignment with the school curriculum and formal quality criteria (see Education Bureau circular memorandum 30/2019). A spokesman for the EDB emphasized that no pro-independence advocacy or activities should appear in school texts, and the promotion of illegal political campaigns for independence must be banned in schools (Cheng, 2016).

The process of approving textbooks was/is one of the mechanisms of curriculum control adopted by the ED/EDB. Censorship of and self-censorship by HK publishers have been exercised with a view to ensuring that textbooks are deemed "politically correct" by the PRC authorities (see Morris, 1992; Morris & Adamson, 2010). In April 2018, Chief Executive Carrie Lam said that China has always had sovereignty over HK, and school textbooks should not describe the 1997 handover as a transfer of or taking back or recovering sovereignty (Lum, 2018). After the proposed removal of these words from school textbooks, the official protocol office changed its website to delete any mention of a "handover of sovereignty".

Revision of the Chinese History curriculum in the HK's school curriculum has been controversial because of fears of political censorship. Unlike countries or regions that have one history subject in their core curriculum, such as the PRC, Singapore, Spain, the UK, and the US, there are two history subjects in HK's school curriculum: History (also referred to as World History) and Chinese History. Steps have been taken to incorporate local history into the two history subjects in secondary schools (Law, 2004; Vickers & Kan, 2003). In 1997, local history was introduced into the Chinese History curriculum for junior secondary classes (Curriculum Development Council, 1997). A previously independent topic, HK history, was inserted into the World History curriculum in 1998–1999. Then, in the last ten years, local history has been integrated into both Chinese and World History lessons taught in secondary schools (Vickers & Kan, 2003).

Since September 2016, the EDB has engaged in public consultation on the revision of the secondary school curriculum with respect to the Chinese History curriculum, and a new syllabus is expected to take effect in the 2020 school year. The new compulsory Chinese History subject for the junior secondary level will be about the city's background and the development of Mainland China. Relationships between HK and China since 1949, the Sino-British negotiations on HK's handover to China, the establishment of the *Basic Law*, and the city's mini-constitution will also be part of the new syllabus (see Curriculum Development Council, 2017). However, when asked in a press conference about whether the incidents of the 1967 riots in HK and the 1989 Tiananmen Square Incident in Beijing would be covered, Deputy Secretary for Education, Hong Chan Tsui-wah, said that it was impossible to go into detail on each single incident from the past. Education Secretary Kevin Yeung also stressed that the HKSAR believes that these two events are not significant or important enough to warrant inclusion in the revised Chinese History curriculum (*The Standard*, 31 October 2017).

Another means of control of education is in the types of questions that can be asked. For example, the HK Diploma of Secondary Education history examinations in May 2020 asked candidates, "Did the Japanese occupying China in the war result in more pros or cons?" from 1900 to 1945. The EDB slammed the question, which was criticized for

seriously hurting the feelings and dignity of Chinese people (particularly those who had suffered greatly during the Japanese aggression), and urged the Hong Kong Examinations Assessment Authority to follow up and rectify the question. Consequently, the controversial question was invalidated on 22 May (Hong Kong Examinations and Assessment Authority, 2020).

Textbooks in HK are published by different local publishers, and schools have a right to choose whichever textbooks they prefer. Unlike those for the three other compulsory subjects—Chinese, English, and Mathematics—textbooks for liberal studies require the approval of the EDB. In September 2019, the EDB announced that they would consider the possibility of requiring publishers to submit their liberal studies textbooks for approval by the EDB and, in the long run, EDB would produce a list of recommended textbooks. The HK Government's requirement that publishers of liberal studies textbooks seek approval of content has brought about mixed reactions—some feared government scrutiny would lead to political censorship, while others considered it the right thing to do.

Since June 2019, young people in HK have continued to join protests and there has been increasing violence. Some commentators believe that the school education system is to blame (Liu et al., 2019). Former HK Chief Executive, Tung Chee-hwa (now a vice-chairman of China's top political advisory body) stated that the liberal studies subject, which was designed for senior secondary school students in 2009 for the university entrance examination, was a failure. He encouraged HK's young people to be radical in violent protests in 2019 (see *South China Morning Post*, 2019).

## POLITICIZATION OF NATIONALISM IN THE CURRICULUM

The issue of national identity (though it was not officially discussed as an issue before 1997) among the younger generation has become highly politicized in HK. Under the unprecedented framework of "One Country, Two Systems" the EDB has published teaching materials in accordance with the *Basic Law*,[4] including in curriculums such as the general studies subjects in primary schools, life and society subjects and Chinese History at the junior secondary level, and liberal studies at the senior secondary level (see Curriculum Development Council, 2011; Education Bureau, 2012). Some of these introduced materials might account for the rise of localist sentiment in HK, such as the raising of pro-independence banners in September 2017 and, immediately thereafter, a joint statement by ten university presidents in HK who objected to "recent abuses" of free expression on campus and claimed that the removal of such banners contravened the *Basic Law*.

The HKSAR Government is attempting to overcome such encounters, which have resulted from the long colonial period, by promoting Chinese culture in the school curriculum. One of the most significant influences of China's cultural heritage was an increase of students' engagement in learning about China's cultural heritage. The HKSAR Government encouraged schools to assemble flag guard teams and promote

[4] According to article 27 of the *Basic Law*, "Hong Kong residents shall have freedom of speech, of the press and of publication; freedom of association, of assembly, of procession and of demonstration".

flag-raising ceremonies. National symbols and rituals, such as respect for the PRC flag and singing the PRC anthem, indicate how nationalization (i.e., the actions of a government asserting or taking control of a nation-state) has emerged to various degrees in schools. In 2008, a National Education Funding Scheme for Young People was launched to subsidize and support large-scale national education activities, including the organization of Mainland trips for young people (HKSAR, 2009). Since 2001, moral and civic education has been accorded as one of the four Key Tasks aimed at nurturing students in the seven priority values and attitudes in whole-person education: "Perseverance", "Respect for Others", "Responsibility", "National Identity", "Commitment", "Integrity", and "Care for Others" (Curriculum Development Council, 2014, p. 24, 2017, p. 3).

On 30 April 2012, the EDB declared that moral and national education, aimed at promoting a deeper sense of identification with China among local HK, would be introduced as a standalone subject in a "progressive manner" through a three-year initiative, becoming compulsory in primary schools in 2015 and in secondary schools in 2016 (for details, see Chong, 2017; Fung & Lui, 2017). This declaration sparked protests among HK citizens, who claimed it was "brainwashing" youth in the form of pro-Mainland propaganda. During the peak day of the protest on 29 July 2012, 90,000 people, or 32,000 as estimated by the government, took to the streets to demonstrate. In September 2012, protestors, including parents, teachers, and students, expressed their outrage concerning the launch of national education initiative in the school curriculum by taking part in a demonstration outside government headquarters in HK. The trigger for the protest was a 34-page booklet entitled *The China Model* (which paid homage to China's one-party system) that was given out to primary and secondary school students (see Lai, 2012; Veg, 2017). On 9 September 2012, the government announced an indefinite suspension of the compulsory implementation of the new curriculum, thus ending the political crisis.

China's opposition to Japanese imperialism is integral to the history of the PRC's national anthem in HK's schools. In September 2017, the National People's Congress Standing Committee of the PRC (China's top legislature) approved the *National Anthem Law*, which came into effect on the Mainland at the beginning of October 2017. Attendees at events where the PRC's anthem is played are required by law to stand solemnly. According to a government document submitted in March 2018 to the Legislative Council's Panel of Constitutional Affair, the local bill will include political statements that primary and secondary schools will need to teach students to sing and understand the history of the Chinese national anthem. Education about the anthem in primary and secondary schools is compulsory, and sanctions are applied to those who ignore or disrespect the work. In June 2020, the EDB set out guidelines advising schools to observe the anthem rules during other events, such as open day and sports day. School heads are encouraged to look into cases of violations by teachers and students and to call the police if the acts involve serious and deliberate insults to the Chinese anthem. If the Chinese flag is raised at the same time the anthem is played, attendees must face the flag. The law criminalizes singing malicious parodies or derogatory forms of the anthem, which could lead to a maximum fine of HK$50,000 (US$6,400) and a three-year prison term. However, international schools in HK are not required to teach students about the Chinese national anthem. The HKSAR hopes that the Chinese national flag and the Chinese national anthem ("March of the Volunteers")

will help strengthen students' patriotism, which is why all schools must participate in flag ceremonies, particularly on National Day on the 1st of October.

## CONCLUSION AND IMPLICATIONS

By exploring the political construction and paradigms of knowledge, the formation of identity, and the support of the paramount ideology through school education, knowledge is not viewed as independent; rather, it is a reflection and reconstruction of the social and historical contexts in which it was fabricated (see Apple, 2012; Aronowitz & Giroux, 1993; Foucault, 1980). With a particular focus on state, knowledge, and power, this article has described the political struggles and the changes to the education system of HK in response to the political considerations raised by the British handover of HK to China in 1997. The multifaceted implications of the politicization of HK school education are an extension of the political system that usurps teaching and learning freedoms. The introduction of national identity teachings is a means of emphasising the principles of HK as part of China and "One Country, Two Systems", and to promote a unifying cultural identity. It is a political commitment to help students find their roots and adjust culturally and psychologically to the political handover.

A culture of self-censorship and government control has already grown in schools, particularly after Beijing introduced and enacted the *National Security Law* in HK on 1 July 2020. After a curriculum guide is created, textbooks and other related teaching resources regulate how the topics and contents are delivered, as well as the extent of the descriptions that can be made (see Morris & Adamson, 2010, p. 38). Publishers, despite having the "final" authority to print textbooks, may have to delete politically sensitive texts so that the textbooks can be included in the "recommended textbook list". This self-censorship of HK publishers is also exercised to ensure that their textbooks are "politically correct" according to the PRC Government. The implication of self-censorship, the singing of the Chinese national anthem, and the ban on political activities in schools, but not national education issues, are increasing social pressures on the post-colonial bureaucratic administration's education policies and education reforms in the interpretation of "One Country, Two Systems".

In the past few months, a teacher in a government school in HK was suspended for allegedly using "inappropriate teaching materials", and a pro-Beijing secondary school music teacher's contract was not renewed, allegedly because she allowed her students to perform the song "Glory to Hong Kong" (which is deemed an "inappropriate song") during the school's music examinations (Zheng, 2020). In October 2020, a HK primary school teacher, who reportedly taught students about the concepts of freedom of speech and independence, was deregistered by the EDB for using pro-independence materials through the design of his teaching plan for the class. This incident is regarded as the first time that the EDB labled a teacher with "professional failure". Kevin Yeung, the Secretary for Education, said that the incident happened prior to the introduction of the *National Securities Law* (NSL) but, for future cases, they would consult with law enforcement agencies. There has been a call for the EDB to develop teaching materials for schools on the NSL and to provide training for teachers on using them. Part of the NSL includes an introduction of "national security education" in school and university

education. The clear picture to students and teachers is that no pro-independence advocacy or activities will appear in schools. The EDB has also ordered schools to review all reading materials in the curriculum that may be deemed as violating the NSL. Chinese nationalism, cultural identity, and cultural experience have emerged as one of HK society's fundamental problems (see Fairbrother & Kennedy, 2011; Tse, 2007).

A further implication of the educational challenges of the post-1997 handover is socialization into a "One Country, Two Systems" society. Political control can be seen as a form of cultural identity in relation to the curriculum. This framework of "official" knowledge centred on what is included and excluded in textbooks signifies the exercise of power by the EDB. The post-colonial HK state's selective avoidance of offending China is the reason for the exclusion of the 1967 riots and the 1989 TSI, while other events, such as Deng Xiaoping's policy of economic reform and opening to the world, have been retained in the revised course syllabus for junior secondary Chinese History education. The History and Chinese History subjects are considered a significant terrain of inclusion and exclusion. For China, the 1989 TSI was regarded as "disloyal" and "unpatriotic" (Ho, 2007), and HK was described as a subversive base that intended to overthrow the Chinese Communist authorities because of its support of the Beijing democratic movement. The excluded topics in the revised History curriculum and the introduction of topics/subjects, such as education in *Basic Law* and national education, are examples of how citizenship education, civic education, policymaking, and discourse are all tightly connected with power relations in society.

The question of how power works in school education depends on how it can be produced, reproduced, and consumed through the various school subjects and activities in school (see Apple, 2008; Gramsci, 1988). This is what Foucault (1977) referred to as power-knowledge, with the implication that the two coexist. The concept of power-knowledge has had a lasting impact on our understanding of how knowledge is created, distributed, and delivered in classrooms (see Foucault, 1980; Green, 2013). The debate about the politics of knowledge bears, as we have observed in HK, a remarkable resemblance to debates about the notion and practice of its development in Western and non-Western contexts. The outcome depends on the future levels of political stability and local, national, and international relations. In school education, collective memory, cultural identity, and nationalism exert influences both from the top-down impositions of a state-supported nationalistic narrative and bottom-up strategies that should also matter (see Gramsci, 1988). The framing of needs and their projection into school education entail processes of negotiation between inherent and interpreted understandings of needs and between diverse forces in the educational setting. This can be seen in how education is used for nation-building and how tensions between the local and the global are inherent in the curriculum (see Apple, 1996; Ho, 2007; Law, 2004, 2017, 2019). On 16 January 2020, Chief Executive Carrie Lam noted that the "One Country, Two System" framework could be extended if authorities believe that it can be smoothly implemented past its 2047 expiry date. However, there still might be time for HK academics to balance global, national, and local elements with the "One Country, Two Systems" structure (Law, 2017).

To conclude, with a specific emphasis on power relations in producing and consuming knowledge in schools, I have argued that the challenges in the current wave of HK education reforms have been in response to the dynamic, contentious process of political construction in its production of new cultural/national identity. It has been

observed that the included and excluded knowledge and school activities in school education have varied in the dimension of political and social encounters to boost students' patriotism and affiliation with the Mainland. HK education is deeply implicated in the Chinese politics of culture, and it will remain an issue for future political and cultural development. How far is it possible to articulate the concept of "One Country, Two Systems" in school education identity after the 23rd anniversary of HK's handover from Britain to China? What should be remembered is the types of education practices that can facilitate thinking about the dynamics and dilemmas of identity, power, and politics to understand the curriculum contents. As education is a social institution, there is a question of how policymakers value pedagogical reflection in the teaching profession and how knowledge is identified, delivered, and contextualized in the classroom pertaining to teachers' and students' identity construction; this may be worth observing in the future, particularly during or in the aftermath of the ongoing 2019–2020 anti-government demonstrations in HK.

**Acknowledgments**

The author would like to thank the Research Grants Council of the Hong Kong Special Administrative Region (HKBU12656516) for providing financial support for this review of education policy.

## REFERENCES

Anderson, B. (1991). Imagined communities: Reflections on the origin and spread of Nationalism. Verso.

Apple, M. W. (1993). The politics of official knowledge: Does a national curriculum make sense? Discourse, 14(1), 1–16. https://doi.org/10.1080/0159630930140101

Apple, M.W. (1996). Cultural politics and education. Teachers College Press.

Apple, M. W. (2008). Can schooling contribute to a more just society? Education, citizenship and social justice, 3(3), 239–261. https://doi.org/10.1177/1746197908095134

Apple, M. W. (2012). Can education change society?. Routledge. https://doi.org/10.4324/9780203083550

Aronowitz, S., & Giroux, H. A. (1993). Education still under siege (2nd. ed.). Bergin & Garvey.

Bauman, Z. (1992). Soil, blood and identity. The Sociological Review, 40(4), 675–701. https://doi: 10.1111/j.1467-954X.1992.tb00407.x

Bauman, Z. (2000). Liquid modernity. Polity Press.

Bauman, Z. (2001). The individualized society. Polity Press.

BBC News. (2019, 2 September). Hong Kong protests: Students boycott class on first day back. https://www.bbc.com/news/world-asia-china-49548089

Bendix, R. (1964). Nation-building and citizenship. John Wiley.

Bourdieu, P. (1979). Symbolic power. Critique of Anthropology, 4, 77–85.

Carroll, J. M. (2007). A concise history of Hong Kong. Hong Kong University Press.

Chen, Y. C., & Szeto, M. M. (2015). The forgotten road of progressive localism: New preservation movement in Hong Kong. Inter-Asia Cultural Studies, 16(3), 436–453.

Cheng, K. (2016, 15 August). Teachers warned they could lose qualifications for advocating independence in schools, Hong Kong Free Press. https://www.hongkongfp.com/2016/08/15/teachers-warned-lose-qualifications-advocating-independence-schools/

Cheng, L., & Fell, D. (2014). The change of ruling parties and Taiwan's claim to multiculturalism before and after 2008. Journal of Current Chinese Affairs, 43(3), 71–103.

Chu, Y. W. (2017). Who speaks for Lion Rock? Pro-Cantonese campaign (or lack thereof) in Hong Kong, In M. H. K. Ng & J. D. Wong (Eds.), Civil unrest and governance in Hong Kong: Law and order from historical and cultural perspectives (pp. 196–212). Routledge.

Chong, E. K. M. (2017). From citizenship education to national education: Perceptions of national identity and national education of Hong Kong's secondary school teachers. Routledge. https://doi.org/10.4324/9781315624693

Civil Service Bureau. (2020). Official languages division. https://www.csb.gov.hk/english/aboutus/org/scsd/1470.html

Curriculum Development Council. (1997). Zhongguo lishi (Zhongxue 1–3) (Chinese History) (Secondary 1–3). Hong Kong: Government Printer.

Curriculum Development Council. (2011). General studies for primary schools curriculum guide (Primary 1 – Primary 6). Government of HKSAR.

Curriculum Development Council. (2014). Basic education curriculum guide – 3A Moral and civic education. Hong Kong: Government of HKSAR.

Curriculum Development Council. (2017). Secondary education curriculum guide – Booklet 6A: Moral and civic education: Towards values education. Government of HKSAR.

Delanty, G. (2000). Citizenship in a global age: Society, culture, politics. Open University Press.

Durkheim, E. (1964). The division of labor in society (translated by G. Simpson). Free Press.

Durkheim, E. (1974). Sociology and philosophy (translated by D. F. Pocock). Free Press.

Durkheim, E. (1995). The elementary forms of religious life (translated and with an introduction by K. E. Fields). Free Press.

Education Bureau. (2012) (Reprinted in 2015). Understanding the law, access to justice (Basic Law learning package (Junior Secondary) introductory booklet. Government of the HKSAR.

Education Bureau. (2019). Education Bureau circular memorandum No. 30/2019. https://applications.edb.gov.hk/circular/upload/EDBCM/EDBCM19030E.pdf

Fairbrother, G. P., & Kennedy, K. T. (2011). Civic education reform in Hong Kong: What should be the direction under Chinese sovereignty? Cambridge Journal of Education, 41(4), 425–443. https://doi: 10.1080/0305764X.2011.625000

Foucault, M. (1977). Discipline and punish: The birth of the prison. Random House.

Foucault, M. (1980). Power/knowledge: Selected interviews and other writings, 1972–1977. (C. Gordon et al. Trans). Pantheon Books.

Fung, A. (2004). Postcolonial Hong Kong identity: Hybridising the local and the national. Social Identities, 10(3), 399–414.

Fung, D. C. L., & Lui, W. M. (2017). Education policy analysis: Liberal studies and national education in Hong Kong. Springer.

Gadir, Y. M. H. A. (2015). Politicity of education: Education in Sudan during different ruling systems. Ahfad Journal, 32(1), 3–14.

Gellner, E. (1983). Nations and nationalism. Cornell University Press.

Gilroy, P. (1997). Diaspora and the detours of identity. In K. Woodward (Ed.), Identity and difference (pp. 301–346). Sage.

Gramsci, A. (1988). An Antonio Gramsci reader: Selected writing, 1916–1935 (D. Forgas, Ed.). Schocken Books.

Green, A. (2013). Education and state formation: Europe, East Asia and the USA. Palgrave Macmillan.

Greenfeld, L. (1992). Nationalism: Five roads to modernity. Harvard University Press.

Halbwachs, M. (1992). On collective memory. University of Chicago Press.

Ho, W. C. (2007). Politics, culture and school curriculum: The struggles in Hong Kong. Discourse: Studies in the Cultural Politics of Education, 28(2), 139–157.

Hobsbawm, E. (1991). The perils of the new nationalism. The Nation, 4 November, 555–556.

Hobsbawm, E. (1992a). Ethnicity and nationalism today. Anthropology Today, 8, 3–8.

Hobsbawm, E. (1992b). Nationalism: Whose fault-line is it anyway?. New Statesman and Society, 24 April, 23–26.

Hong Kong Examinations and Assessment Authority. (2020). Press release: Invalidation of 2020 HKDSE history examination question, 22 May. Retrieved from: https://www.hkeaa.edu.hk/DocLibrary/Media/PR/PR_Invalidation_of_hist_exam_question_eng.pdf

Hong Kong Free Press. (2019, 2 July). Hong Kong police deploy tear gas, reclaim legislature from anti-gov't protesters. https://hongkongfp.com/2019/07/02/breaking-tear-gas-deployed-police-clear-admiralty-protesters/

Hong Kong Institute of Asia-Pacific Studies, The Chinese University of Hong Kong. (2016). Survey findings on views on the use of Putonghua and simplified Chinese in Hong Kong. https://www.cpr.cuhk.edu.hk/en/press_detail.php?id=2251&t=survey-findings-on-views-on-the-use-of-putonghua-and-simplified-chinese-in-hong-kong-released-by-hong-kong-institute-of-asia-pacific-studies-at-cuhk

Hong Kong Special Administration Region (HKSAR). (2009). Breaking new ground together. Hong Kong: Government Printer.

Huntington, S. (1996). The clash of civilizations and the remaking of the world order. Touchstone, Rockefeller Center.

Information Office of the State Council. (2014). The practice of the "One Country, Two Systems" policy in the Hong Kong Special Administrative Region. http://www.fmcoprc.gov.hk/eng/xwdt/gsxw/t1164057.htm

Lai, A. (2012, July 30). 'National education' raises furor in Hong Kong. *Cable News Network*. http://www.cnn.com/2012/07/30/world/asia/hong-kong-national-education-controversy/

Law, W. W. (2004). Globalization and citizenship education in Hong Kong and Taiwan, Comparative Education Review, 8(3), 253–273.

Law, W. W. (2017). Higher education in post-1997 Hong Kong: Politics, academic freedom, and civic engagement. In G. A. Postiglione & J. S. Jung (Eds.), The changing academic profession in Hong Kong (pp. 39–75). Springer.

Law, W. W. (2019). Politics, managerialism, and university governance: Lessons from Hong Kong under China's rule since 1997. Springer. https://doi: http://dx.doi.org/10.1007/978-981-13-7303-9

Liu, L., He, S. S., Li, B. C., & Gu, M. Y. (2019, December 25). Student activism exposes defects of HK education, China Daily. https://www.chinadailyhk.com/articles/206/146/112/1577241719376.html

Lum, A. (2018, April 24). Nothing wrong with school history textbooks reflecting Chinese view of Hong Kong handover, Carrie Lam says, South China Morning Post. https://www.scmp.com/news/hong-kong/politics/article/2143085/hong-kong-textbooks-row-much-ado-about-nothing-says-carrie

Ma, E. (1999). Culture, politics and television in Hong Kong. Routledge. https://doi: https://doi.org/10.4324/9780203978313

Mathews, G., Ma, E., & Lui, T. L. (2008). Hong Kong, China: Learning to belong to a nation. Routledge.

Morris, P. (1992). Preparing pupils as citizens of the Special Administrative Region of Hong Kong: An analysis of curriculum change and control during the transition period. In G. A. Postiglione (Ed.), Education and society in Hong Kong: Toward one country and two systems (pp. 117–145). Hong Kong University Press.

Morris, P. (2009) Education, politics and the state in Hong Kong. In M. Lall & E. Vickers (Eds.), Education as a political tool in Asia (pp. 83–101). Routledge.

Morris, P., & Adamson, B. (2010). Curriculum, Schooling and Society in Hong Kong. Hong Kong: Hong Kong University Press. *doi: 10.5790/hongkong/9789888028016.001.0001*

Morris, P., & Chan, K. K. (1997). Education and political transition: Implications of Hong Kong's change of sovereignty. Comparative Education, 33(2), 247–264.

Ogunniran, M. (2020). The opening-up of education in the new era: Communist Party of China (CCP) and the Central Committee. Educational Philosophy and Theory. https://www.tandfonline.com/doi/full/10.1080/00131857.2020.1762290

Pang, Q., & Jiang, F. (2019). Hong Kong's growing separatist tendencies against China's rise: Comparing Mainland and Hong Kong college students' national identities. Journal of Current Chinese Affairs, 48(1), 3–28. https://doi.org/10.1177/1868102619886597

Pickering, W. S. F. (2000). Representations as understood by Durkheim. In Pickering, W. S. F. (Ed.), Durkheim and representations (pp. 9–24). Routledge.

Public Opinion Programme. (2017). People's ethnicity identification. The University of Hong Kong. https://www.hkupop.hku.hk/english/release/release1474.html

South China Morning Post. (2019, October 27). Hong Kong protests are proof that schools have failed young students. https://www.scmp.com/comment/letters/article/3034521/hong-kong-protests-are-proof-schools-have-failed-young-students

South China Morning Post Reporters. (2019, September 2). Hong Kong protests: Class boycott hits schools on first day of term, South China Morning Post. https://www.scmp.com/news/hong-kong/education/article/3025294/hong-kong-protests-thousands-school-students-expected-join

The Standard. (2017, October 31). June 4 and 1967 riots, relative less important, says education chief. http://www.thestandard.com.hk/breaking-news.php?id=98909&sid=3

Tsang, S. (2004). A modern history of Hong Kong. Hong Kong University Press.

Tse, T. K. C. (2007). Re-making Chinese identity: Hegemonic struggles over national education in post-colonial Hong Kong. International Studies in Sociology of Education, 17(3), 231–248. https://doi.org/10.1080/09620210701543908

Veg, S. (2017). The rise of localism and civic identity in post-handover Hong Kong: Questioning the Chinese nation-state. The China Quarterly, 230, 323–347. https://doi.org/10.1017/S0305741017000571

Vickers, E., & Jones, A. (2005). History education and national identity in East Asia. New York: Routledge. https://doi.org/10.4324/9780203955369

Vickers, E., & Kan, F. (2003). The re-education of Hong Kong: Identity, politics and history education in colonial and post-colonial Hong Kong. American Asian Review, 21(4), 179–228.

Wang, Y. D. (2019). Local identity in a global city: Hong Kong localist movement on social media. Critical Studies in Media Communication, 36(5), 419–433. https://doi.org/10.1080/15295036.2019.1652837

Weber, E. (1976). Peasants into Frenchmen: The modernization of rural France, 1877–1914. Stanford University Press.

Yuen, L. C. (2018, April 24). Xin xianshi xia de qingshao nian guomin shenfen [The national identity of the youths under the new reality]. Ming Pao Daily News, p. A26.

Zheng, M. (2020). Teacher pays for allowing protest anthem in exam. The Standard, 12 June. Retrieved from: https://www.thestandard.com.hk/section-news/section/4/219924/Teacher-pays-for-allowing-protest-anthem-in-exam

Zimmer, O. (2003). Boundary mechanism and symbolic resources: Towards a process-oriented approach to national identity. Nations and Nationalism, 9(2), 173–193. htpps://doi.org/10.1111/1469-8219.00081

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# Japanese college students' study abroad decisions: Perspectives of Japanese study abroad administrators

**Richard Porter**
Texas Tech University, US: *richard.porter@ttu.edu*
**Noriko Porter**
Washington State University, US: *nori_porter@wsu.edu*

*This paper examines the factors that impact Japanese students' decisions to study abroad from the perspectives of Japanese study abroad administrators. In-depth interviews of five study abroad administrators at Japanese universities were qualitatively analysed. Bronfenbrenner's Ecological Systems Theory was used to identify various immediate and distant environmental factors related to students' decisions to study abroad. The results suggested mixed findings for factors affecting contemporary Japanese students studying abroad, such as the 'inwardness' of Japanese students and the success of current Japanese government and corporate efforts to internationalize higher education. In addition, the study found that the Japanese cultural pattern of conformity and dependent parent-child relationships are affecting students' choice to go overseas. These findings have implications for (1) study abroad administrators to use culturally calibrated strategies in facilitating study abroad participation through greater involvement of peers and parents, and (2) policymakers to provide more individual scholarships than targeted institutional support.*

*Keywords: study abroad; Japan; higher education; international office administrator; qualitative*

## INTRODUCTION

In response to the rapid globalization of the world economy, universities around the world are increasingly emphasizing the importance of global competencies. Such skills are considered critical for students and nations to be able to compete and succeed in the global marketplace and for promoting understanding and peaceful cooperation among nations. Study abroad is one primary way for students to develop these global competencies. However, it is not well understood how cultural patterns in different countries affect the factors associated with students' decisions to study abroad. These factors may differ between students from those identified by Geert Hofstede as more 'individualistic' cultures, such as the United States (US) and Australia, and students from those identified as more 'collectivist' cultures such as Japan. Understanding the factors that influence Japanese students' decisions to study abroad is especially critical in Japan, where the numbers of students participating in study abroad programs has declined dramatically over the past two decades. Although participation in short-term

study abroad programs has rebounded over the past few years (Japan Student Services Organization [JASSO], 2020), the downward trend continues for participation in long-term programs (Institute for International Education (IIE), 2019a; JASSO, 2020). The goal of this research is to explore the factors associated with current Japanese college student study abroad decisions from the perspective of study abroad administrators at Japanese universities.[1]

## LITERATURE REVIEW

Over the past few decades, there has been a dramatic increase in international student mobility. According to a report by the IIE (2019b), 5.3 million students studied outside of their home country in 2019, an increase from two million in 2001(165%). In the midst of the worldwide increase in student mobility during that period, one of the countries that has stood out as anomalous is Japan. The number of Japanese students studying in the US, which had been the most popular destination, declined by 61% from 46,872 students in 2000 to 18,105 students in 2019 (IIE, 2019a). This decline contrasts with other East Asian countries, such as Korea and China, where the trend has been in the opposite direction (IIE, 2019a; Park, 2016). For example, Korea, which has a population of just 51 million compared to 126 million in Japan, sent 52,250 students to the US in 2019. The downward trend in Japanese participation in study abroad is especially evident for longer term study abroad programs (Shimmi & Ota, 2018), with the number of Japanese students choosing to study abroad for more than one year accounting for less than 2% of all Japanese students who study abroad (JASSO, 2020).

### Factors associated with Japanese college students' decisions to study abroad

Previous studies have suggested a wide range of factors associated with this decline in Japanese college students' participation in study abroad programs (e.g., Kuromiya et al., 2016; Ota, 2013; Park, 2016; Takehara et al., 2016). Some of the common factors identified in these studies are prohibitive financial burden, incompatibility with the Japanese academic calendar, lack of English ability and confidence, potential negative impact on future employment, and the "inward tendencies" of contemporary Japanese students.

### Financial burden

A family's financial capacity can factor into the decision to send children to study abroad. The cost of study abroad in the West is viewed as one of the primary obstacles for Japanese college students (Grimes-MacLellan, 2017; Ota, 2013). In particular, the rising cost of college tuition in Western contexts has made the decision to study abroad even harder for Japanese students (Ota, 2013). That said, economic burden may not be the primary factor contributing to low participation by Japanese students in study abroad. Although Japan, China, and South Korea all experienced substantial growth in

[1] The original version of this paper was previously published as an online article at Child Research Net (www.childresearch.net). The revised paper is published here with permission from CRN. Child Research Net is a Japanese web-based child research institute promoting interdisciplinary and international activities under the philosophy "Children are our future". CRN's activities are supported by Benesse Educational Research and Development Institute.

purchasing power parity (PPP)[2] from 1999 to 2017 (Index Mundi, 2020), PPP increases in China and South Korea have been mirrored by substantial increases in participation in study abroad programs in the US. In Japan's case, the number of students studying abroad in the US has dropped by over 60% since 1999 (IIE, 2019b), even though Japan's PPP increased by nearly 84% over the same time period (Index Mundi, 2020). These divergent patterns among East Asian countries cast doubt on the validity of a straightforward economic explanation for decreasing participation by Japanese students in study abroad programs.

**Incompatibility with the Japanese academic calendar**

Japan's academic calendar has made it difficult for Japanese students, particularly at the post-secondary level, to take a break to participate in long-term study abroad experiences (Lassegard, 2013). The traditional Japanese university schedule, which starts in early April and ends the following March, differs from that of most universities outside Japan. This makes it challenging for Japanese universities to form exchange partnerships with foreign institutions.

**Lack of English ability and confidence**

Japan's English language curriculum is often faulted for its failure to develop communicatively competent or confident students who are able to gain admittance and succeed at foreign institutions (Hayase, 2017). In spite of substantial investment in English education (students study English from middle school through high school, and increasingly starting in elementary school), the average combined TOEFL score of Japanese students (72) is lower than students from other non-English-speaking countries in Southeast Asia, such as Korea (83), Taiwan (83), and China (81) (Education Testing Service, 2019). Several studies of Japanese students have revealed lack of language ability and confidence to be the first or second most common reason cited by Japanese students for not studying abroad (British Council, 2014; Takehara et al., 2016).

**Negative impacts on employment prospects**

The hiring patterns of employers in Japan often discourage students from participating in study abroad (Ota, 2013). Lack of incentive for gaining study abroad experience in relation to future employment was one of the common reasons cited by Japanese students as a reason for not studying abroad. About 70% of Japanese students do not think or do not know if employers value university graduates with study abroad experience (British Council, 2014). The traditional hiring schedule rigidly adheres to the Japanese academic calendar (Ota, 2013). Students who delay graduation or graduate on a different schedule get out-of-sync with the hiring cycle, which places them at a real or perceived disadvantage with their peers who remain in Japan.

**Students' "inward tendencies"**

The supposed "inward tendencies" of contemporary Japanese college students is another reason cited for Japanese students' non-participation in study abroad (Park, 2016). "Inward tendency" refers to a reluctance among contemporary Japanese students to venture beyond the comfort and security of the familiar, safe context of their home

[2] PPP is a measure that many economists prefer when looking at per-capita welfare.

country (Arima, 2014; Ota, 2013). Yet, some researchers have questioned this assessment of the current generation of Japanese students (e.g., Ota, 2014). Based on several surveys of Japanese youths' views on globalization, Ota (2014) concluded that Japanese youths typically fall into one of two categories: those who are strongly oriented toward study abroad and those who are weakly oriented toward study abroad. The latter group cited lack of English language ability, worries about living overseas, and not having an interest in living overseas as reasons for their hesitance.

### Recent internationalization initiatives by Japanese Government

The decline over the past decade in the number of Japanese students studying abroad around the world compared to other countries in the region is of great concern to the Japanese government and the private sector (The Ministry of Education, Culture, Sports, Science and Technology, 2018). The resulting shortage of Japanese youth with cross-cultural competencies is viewed as a challenge to the long-term health of the Japanese economy and Japan's leadership role in the world. The Japanese government has recently introduced a number of initiatives aimed at developing a future workforce that has a more global mindset and experience, including the *Tobitate* Scholarship program, whose goal is to foster human resources that can succeed in the global field (The Ministry of Education, Culture, Sports, Science and Technology, 2020).

### Justification for the current study

Most previous studies that investigated factors influencing students' decisions to study abroad have been based on opinions from experts and on student surveys (e.g. Kuromiya et al., 2016). To the authors' knowledge, no studies have investigated current trends in Japanese college students' study abroad participation from the perspective of professionals who work in university study abroad offices in Japan. Study abroad administrators work directly with current students at Japanese universities and are responsible for implementing university and government initiatives to encourage study abroad participation. Thus, they are in a unique position to evaluate Japanese government and university initiatives, and student motivational factors; understanding these administrators' perspectives may result in better-informed government initiatives and more effective ways to encourage greater study abroad participation. Accordingly, the purpose of this study was to examine factors impacting the decisions of Japanese students to study abroad from the perspective of Japanese study abroad administrators based on in-depth interviews.

## RESEARCH DESIGN

We employed a qualitative research method to capture the complex interplay of cultural and social factors that potentially influence a student's decision to study abroad. Specifically, we took a phenomenological approach, which is utilized to gain insight into the common or essential experiences of a group (Creswell, 1998). We reasoned that a phenomenological approach, which focuses on peoples' subjective lived experiences and their interpretations of those experiences, would be beneficial for identifying commonalities among the perceptions of these Japanese study abroad administrators, who are key players in the current efforts by universities to increase the number of Japanese students that study abroad.

In addition to a phenomenological approach, we used Bronfenbrenner's Ecological Systems Theory as a framework for developing interview questions and analyzing data. According to Bronfenbrenner (1986), human development and behaviour are influenced by the environmental contexts in which an individual is directly or indirectly immersed. Ecological Systems Theory provides a scheme for systematically examining multiple factors influencing Japanese college students' study abroad decisions including factors in the students' immediate environments such as family, peers, and schools (Microsystem) and the relationships between these environments (Mesosystem). It also provides a scheme for examining the influence of systems that affect students more indirectly, including Japan's educational, economic, and political systems (Exosystem). The overarching attitudes and ideologies of Japanese culture (Macrosystem) are particularly important in evaluating factors associated with Japanese students' decisions and views toward study abroad. Finally, Ecological Systems Theory also provides a scheme for examining historical events, timing, transitions, and changes that occur over time, which are also critical for understanding the situation that current Japanese students face (Chronosystem).

## Authors' background and epistemological assumptions

Both authors of this study have experience working at higher education institutions in Japan and the US. The first author, a US native, has worked as an international educator at universities in the US for 23 years in addition to his career as a college English instructor at a university in Japan for six years. As Director of International Programs at one of the institutions he worked for in the US, he administered a study abroad office for over three years. The second author is a Japanese native who has experience teaching at universities in both Japan and the US. We believe our backgrounds enable us to provide a thick description of the study participants' perceptions, which involves paying attention to contextual detail in interpreting social meaning and understanding its relevance (Schwandt, 2001).

Our epistemological assumption is that our experiences working in universities in both countries and working directly with Japanese students allow us to better understand and interpret interviewees' responses with greater depth. In order to mitigate distorting effects of our preconceptions and biases, the first author, who conducted the interviews, kept a reflective journal regarding the interview process, including his assumptions and feelings, so that he could assess his own preconceptions. These reflections were also shared with the second author. The approach was used as a means of "bracketing," which is a process through which a phenomenological researcher intentionally acts to mitigate the distorting effect of his bias and preconceptions (Tufford & Newman, 2010).

## Method

### Participant selection

All of the university study abroad program administrators who participated in this study had studied abroad themselves at various Western institutions. Purposeful sampling was employed to recruit Japanese study abroad administrators who (1) were working in international affairs/study abroad offices at Japanese universities at the time of the survey and (2) had received doctoral degrees from English-speaking institutions outside Japan. There were primarily two reasons for these sampling criteria. First, it was

anticipated that, because of their bi-cultural study abroad experiences and involvement in coordinating study abroad programs, they would be able to provide profound insight into students' motivations and the efforts of Japanese universities to promote study abroad. Second, it was assumed that individuals with these qualifications would be highly proficient in English and would be able to articulate their informed cross-cultural perspectives through in-depth interviews conducted in English.

The first author contacted potential research participants through connections made as a member of the Association of International Educators (NAFSA), which is the largest association of international educators in the world. Next, Japanese NAFSA members working at Japanese universities provided a list of potential participants from their professional networks in Japan. This was the most expedient means of contacting potential participants because international education offices at Japanese universities typically do not publish the email addresses of their staff on their websites.

A total of 15 study abroad administrators from 15 Japanese universities, including private and public universities, were initially recruited for the study through the first author's NAFSA connections. The initial screening process included explaining the details of the study and evaluating the educational and occupational background of each participant. Five of the 15 individuals contacted consented to participate in the study. All of the participants were women with terminal degrees from English-speaking institutions outside Japan. They had worked in an international office at a four-year university in Japan from two to 15 years. Three (Ai,[3] Rie, Yuri) worked at top-tier public universities, one (Mari) at a top-tier private university, and one (Kei) at a lower-tier public university. Four out of the five participants' institutions (Ai, Mari, Rie, Yuri) were located in large urban areas, while one (Ai) was located in a rural area. All of the participants' work involved the promotion of study abroad opportunities in the context of an office that promotes and supports study abroad.

**Data collection**

The Human Subjects Committee at the first author's institution granted authorization to conduct the interviews. Data collection took place over a period of four months in the spring of 2016. After initial contact or referrals, the first author contacted the potential participants via email to inquire if they would be willing to participate in the study. Once written consent was obtained, the participants were asked to answer two sets of interview questions. The questions were formulated based on Bronfenbrenner's multi-layered system of relationships (microsystem, mesosystem, exosystem, macrosystem, and chronosystem). Specifically, those systems were divided into students' "immediate" environment (microsystem, mesosystem) comprising family, peer, and school, and the students' "distant" environment (exosystem, macrosystem, and chronosystem) comprising the education system, employment system, government policy, culture, and time.

The interviews began with a framing question, "Tell me about the impact on your students' choice of whether or not to study abroad that the following more immediate environmental factors have had." Then the first author asked specifically about each immediate environmental factor (family, peers, school) and followed up on the

[3] Aliases have been used to protect participants' identities.

participant's response by asking for clarification or seeking concrete details (Seidman, 1998). The same procedure was followed for distant factors (education system, employment system, government policy, and culture and time), beginning with the framing question, "Tell me about the impact on your students' choice whether or not to study abroad that the following more distant environmental factors have had".

The responses to interview questions were collected via email (Kei, Yuri) or phone (Ai, Rie, Mari) depending on each participant's preference based on time considerations and level of comfort with the medium of communication. Three of the participants expressed a stronger preference for email communication because of the time difference between the US and Japan. They also felt that this would give them an opportunity to reflect on the questions and articulate their answers more concisely in English. Both groups were asked the same series of open-ended questions with follow-up questions according to their responses. As for the email interviews, follow up questions, clarification questions, and responses were handled via multiple emails. Because many Japanese study abroad administrators also teach, allowing as much flexibility and accommodation as possible with respect to the interview method helped us recruit a larger number of participants. Phone records were transcribed by a professional transcription service.

## Data analysis

Kuckartz (2014) explained that it is not contradictory to construct categories inductively and deductively for analyzing qualitative data. First, we formulated initial categories based on Bronfenbrenner's Ecological Systems Theory (family, peers, school, education system, employment system, government policy, and culture and time). Next, we identified emerging themes through an inductive open-coding system within each category. This was a process of identifying and naming concepts, comparing the similarities and differences among concepts, and summarizing the concepts into themes.

To check for inter-coder agreement, the first and the second authors independently analyzed the data for the first two participants. The coding for themes were compared, and disagreements were resolved through discussion. The two authors then came up with final rules for coding. The first author finished coding of the remaining three participants.

# RESULTS

To understand the factors affecting Japanese college students' choice to study abroad, we used Bronfenbrenner's theory of human development as a framework to analyze interviews with study abroad administrators at Japanese universities. Eight categories were created to represent the immediate environment (family, peers, school)[4] and distant environment (education system, employment system, government policy, culture, time) (Figure 1). Two to four themes emerged from each category. The frequencies of each theme are included in the figure.

[4] We excluded the question related to Mesosystem from our analyses because none of the participants had much to say.

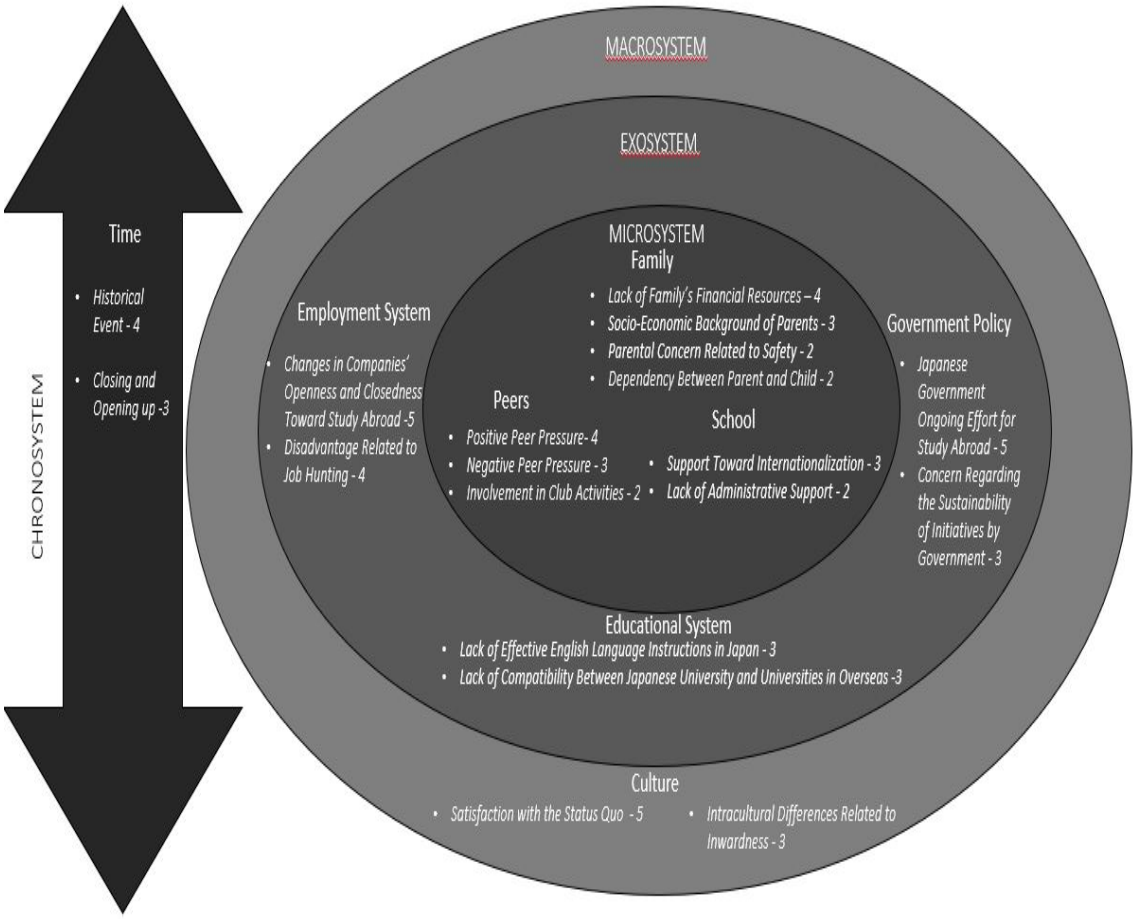


**Figure 1. Themes related to Japanese college students' study abroad decisions based on Bronfenbrenner's Systems Theory**

## Immediate environment

### Family

The main themes that emerged related to the family factor were *Lack of Family's Financial Resources*, *Socio-Economic Background of Parents*, *Parental Concern Related to Safety,* and *Dependency Between Parent and Child*. Four participants identified family financial support as a primary factor that influenced students' study abroad decisions (*Lack of Family's Financial Resources)*. Relatedly, *Socio-Economic Background of Parents* has influenced their perceptions toward their children's opportunities to study abroad. Rie explained:

> The family environment is quite different. As you know, a socioeconomic gap is increasing in Japan. There are a number of students at the poverty level who are struggling to get the money to attend universities.[5]

The participants noted that scholarships and government support are crucial to on-going efforts to encourage lower-income families and rural families to consider study abroad.

[5] The English grammar of the interviewees was corrected by the first author.

Parents often discourage their children from participating in study abroad due to safety concerns (*Parental Concern Related to Safety).* For example, Ai shared that parents canceled trips to France and Thailand after recent terrorist incidents. *Dependency Between Parent and Child* often becomes an obstacle related to Japanese students' decision to study abroad. Kei discussed the Japanese mother-child closeness as the obstacle to study abroad in terms of helicopter parents:

> They are too anxious about the future success of their kids. It seems that they want to continue the connected relationship they had when their kids were younger. This pattern negatively affects students' attitudes and choices regarding study abroad in the form of strong control.

**Peers**

The main themes that emerged related to peer factors were coded as *Positive Peer Pressure*, *Negative Peer Pressure*, and *Involvement in Club Activities.* Four of the participants identified different ways that *Positive Peer Pressure* impacted Japanese students' study abroad decisions. For example, returning or current study abroad students have a positive impact by lowering psychological hurdles to study abroad participation (e.g., "Many students are willingly updating photos on SNS (Facebook, Instagram, and Line) during study abroad to share their experience with their friends." (Kei)). The participants also pointed to the dominant Japanese cultural pattern of conformity to group norms in their discussion of study abroad. Ai noted that if they join a community where everyone studies abroad and enjoys intercultural learning, they are easily motivated to study abroad. However, peer pressure can also manifest itself mainly in a strong tendency to conform to the normative progression to graduation and the job search (*Negative Peer Pressure*). The participants indicated that if students perceive that they will be left behind by their peers in the job search, this can serve as a strong deterrent to study abroad participation.

*Involvement in Club Activities* tied with a strong group mentality in Japan, tends to discourage or distract students from participating in study abroad. Club activities are a big part of the life of college students in Japan. Consequently, even though students initially intended to study abroad, they ended up changing their minds (e.g., "My students sometimes come to me and say, 'Well, teacher, I am really enjoying my club activity, so I don't want to leave Japan.'" (Mari)).

**School**

The main themes that emerged related to school were coded as *Support Toward Internationalization* and *Lack of Administrative Support.* Three participants positively commented on the financial support for study abroad from higher administrators or alumni. For example, Rie talked about the scholarship for exchange students to study abroad that come from a university alumni group. At the same time, two participants also noted a *Lack of Administrative Support* for study abroad, due to institutional budget cuts or lack of financial resources. Ai expressed her frustration in relation to lack of staffing in the international office (e.g., "We always lack staff working for the university. A couple of the members tried to develop programs, but the staff complained because they cannot really handle all of the additional administrative work").

## Distant environment

### Education system

The main themes that emerged related to the education system were coded as *Lack of Effective English Language Instructions* and *Lack of Compatibility Between Japanese Universities and Universities in Overseas. Lack of Effective English Language Instructions* was addressed by three participants, as Japanese students often lack confidence in their English proficiencies. Kei explained that "Generally in Japan, English teachers focus on the grammar, reading, and vocabulary that will be on the test, especially entrance exams. Practical uses of English are often ignored". The three participants, however, recognized the recent positive changes being implemented by the Japanese government, such as teaching English beginning in elementary school and an increase of English taught courses at the college level.

*Lack of Compatibility between Japanese Universities and Universities in Overseas* often becomes an obstacle to students' decision to study abroad because it involves a risk of delayed graduation and additional educational expenses for students. Institutions sometimes failed to support students through their unwillingness to approve transfer credits for study abroad exchange programs. For example, Yuri noted that the differences in school schedules in Japan and universities overseas (such as starting early April vs. the end of August) discourage students from studying abroad.

### Employment system

The main themes that emerged related to the economic factor were coded as Changes in *Companies' Openness and Closedness Toward Study Abroad,* and *Disadvantage Related to Job Hunting*. All participants made comments related to *Companies' Openness and Closedness Toward Study Abroad* returnees. Four participants pointed to different ways that recent changes in business circumstances and hiring practices have begun to favor students who chose to study abroad. Mari stated that "Japanese companies are increasingly evaluating students to determine whether they are globally-ready or globally-minded. Maybe students will receive that kind of message from companies and be encouraged to go overseas." According to the four participants, however, inward-minded business attitudes are still very common in Japan, which often make it difficult for returning study abroad students to find a job. Kei explained, "When they employ new graduates, they commonly give priority to graduates from prestigious Japanese universities and those with personal connections rather than students with experiences and skills acquired by studying abroad." She further indicated her concerns as "in extreme cases, students with study abroad experiences are negatively classified as individuals who failed to adjust to life in Japan . . . Returnees can be seen as too individualistic".

*Disadvantage Related to Job Hunting* was addressed by four participants as a reason for not doing study abroad. In Japan, students begin the process of looking for a job in their junior year and are typically hired immediately after graduation. Consequently, students who study abroad are sometimes excluded from this regimented process. This rigidly timed hiring schedule often discourages students from doing study abroad out of concern that their peers will gain an advantage over them in the job search. For example, Mari shared the experience of returning study abroad students:

> Most of the time, they must start job hunting activities quite soon after returning to Japan. Job hunting activities, norms, and customs are distinctly Japanese, so they really have to follow all the rituals of meeting people who are older and adjusting to the company culture.

**Government policy**

All of the participants acknowledged the positive contribution of the current government and private sector initiatives to send more Japanese students to study abroad (*Japanese Government Ongoing Effort for Study Abroad*). For example, Kei said, "The Japanese government has been doing really well as far as providing funding for universities and sending more students out".

At the same time, three participants expressed *Concern Regarding the Sustainability of Initiatives by the Government* at universities, such as (1) strict rules and restrictions regarding the usage of government funds, (2) reductions/shortages of government funding after the initial approval, (3) instability of government funding based on political changes, and (4) unequal distribution of government funding (mostly distributed to top universities). Mari said that "We wrote all the proposals and action plans based on the funding that we expected to receive, but the amount was reduced. We still need to keep our promises in our proposal, but that is impossible".

**Culture**

The two themes that emerged from the cultural factor were *Satisfaction with the Status Quo* and *Intracultural Differences Related to Inwardness.* The participants described the characteristics of contemporary Japanese students as a cultural pattern of satisfaction and complacency (*Satisfaction with the Status Quo*). Ai explained that her students used to be more adventurous, but they are now comfortable in their nice friend circle, and they just do not want to go out. Mari described her students as not being willing to take risks, face severe challenges, or change.

Three participants pointed out *Intracultural Differences Related to Inwardness*. In particular, two participants mentioned that female students are more willing to take the risk to study abroad if they have opportunities and resources when compared to male students. Mari described the two opposite patterns related to inwardness: "Some parts of Japanese societies are opening up quickly and really aggressively, but the rest of Japanese society is really closing and inward-looking. I see the gap between those two different types of people".

**Time**

The main themes that emerged related to time and socio-historical conditions were coded as *Historical Events* and *Closing and Opening up*. *Historical Events* impact Japanese student openness to participating in study abroad. One feature of current historical events is the patterns of international tensions and terrorist acts, both internationally and in Japan's geographical region, East Asia. For example, at the time of this study, there was growing political tension between Japan and China, which resulted in a declining number of Japanese students studying abroad in China, according to Ai. Yuri and Ai. They also pointed to recent natural disasters that had occurred in Japan (e.g., Tohoku earthquake in 2011), and the subsequent economic difficulties the country experienced, as having a significant impact on study abroad participation.

Three participants commented on the particular historical context that students find themselves in and its impact on Japanese students' openness or closedness to participating in study abroad (*Closing and Opening Up*). One implicit example of the recurrence of this theme was Kei's description of the way that businesses in Japan were opening up due to the pressures of globalization, but also were struggling to adjust to these new realities and unable to change some of their traditional practices to create a welcoming environment for returning study abroad students. Yuri explained that the institutions are trending toward globalization, which subsequently affects study abroad trends as follows:

> Our students see changing patterns in academic culture. We have more international scholars than before, and many professors go to international conferences and have international collaborations. These influence students to think about the importance of overseas experiences.

## DISCUSSION

The purpose of this study was to examine the factors that impact the decisions of Japanese college students to study abroad from the perspectives of Japanese study abroad administrators. As found in previous literature (e.g., Kuromiya et al. 2016; Ota, 2013; Park, 2016; Takehara et al., 2016), the current study also identified a wide variety of environmental factors associated with contemporary Japanese students' choice to study abroad, such as financial burden, incompatibility with the Japanese university schedules and curriculum, the inwardness of Japanese students, and the lack of English ability and confidence. Our study specifically identified mixed views regarding some of the key issues affecting contemporary Japanese students' decisions to study abroad: (1) Japanese corporate hiring practices and business culture, (2) Japanese students' inwardness, (3) Japanese government internationalization initiatives, and (4) financial barriers to study abroad. Furthermore, our findings suggested an association between Japanese cultural patterns and students' study abroad decisions: (1) conformity and harmonious relations and (2) dependency between parent and child. Based on the findings of this study, we will discuss research implications for a variety of constituents, which include policymakers and university administrators in Japan, admissions and recruiting personnel at universities outside of Japan, and study abroad researchers.

In our study, Japanese corporate hiring practices and business culture were referenced as an obstacle for Japanese students' decision to study abroad, which was also identified in previous research (Lassegard, 2013). The responses from the participants revealed concerns related to the timing of the job search, the lack of enthusiasm in hiring students with study abroad experience, and delays in graduation. However, the participants also noted an increase in the global mindset of some large Japanese corporations, which might influence the vision of life trajectories for contemporary students. Along with globalization, Japanese companies recently started underscoring the importance of diversity management (Takai, 2016). Future research may benefit from exploring the 'global' mindset of Japanese companies in relation to the recent emphasis on diversity.

Our findings support previous literature suggesting that Japanese students' satisfaction with the status quo and lack of confidence and initiative are often a hindrance to study abroad (Kuromiya et al., 2016; Ota, 2014). As pointed out by Ota, our study also found

two categories of Japanese youths concerning inwardness, a group that is strongly orientated toward study abroad and a group with a weak orientation toward study abroad. Female college students appear to be more open to study abroad compared to their male counterparts. Japanese female students' generally stronger aspiration toward internationalization was also found in a recent study of Japanese college students (Arima, 2014; Kawano, 2013). Based on the survey conducted of Japanese college students, Arima found that female students had more frequent exposure to different cultures than male students, and more positive attitudes toward working abroad and marrying non-Japanese than male counterparts. In relation to this notion, future researchers may find it profitable to analyze the benefits of study abroad, paying specific attention to career trajectory differences between male and female students. According to the World Economic Forum (2015), Japan has the worst gender gap, next to South Korea, among all industrial nations.

Most of the participants in this study agree that the recent increase in study abroad participation is due in part to the on-going Japanese government internationalization initiatives. Some participants did express concerns, however, about the sustainability of these programs when and if this support comes to an end. In addition, as addressed by Rappleye and Vickers (2015), concerns related to the increasing workload of faculty and international officers as a result of this political effort were expressed by some of the participants. This finding suggests the importance of prioritizing international endeavors at the institutional level and adjusting the budget in a way that will maintain programs that begin with an infusion of resources initially provided by the central government and a recognition of the need for adequate staffing.

Regarding the financial burden as a factor related to study abroad for Japanese college students (Ota, 2013), the current study found increasing economic disparities between Japanese students. The Japanese international affairs' administrators perceived and reported a significant difference in family incomes, which made it difficult for low-income or rural families to pay for study abroad. In addition, there was a difference in career trajectory between the wealthy (predominantly urban dwellers) and poorer, low-income or rural Japanese students. Students from rural areas see themselves in careers that do not necessarily reward those with international experience, while students from urban areas, especially those attending top-tier universities, perceive the benefits of working in global industries and the rewards of international experience. This finding has implications for policymakers. Based on these findings, the government should consider providing more *Tobitate* scholarships to individual students at a variety of institutions, especially students from low-income families, rather than additional funds for select targeted institutions.

The Japanese cultural pattern of conformity and harmonious relations (Davies & Ikeno, 2002) was also identified in this study. Along with parental expectations, students' study abroad choices were often related to the norms of the groups that they associated with (peer pressure) and their immersive involvement in school club activities (Shimmi & Ota, 2018). Shimmi and Ota explained that Japanese college students' participation and priority in club activities is one of the reasons for their preference for "super-short-term" study abroad programs. This finding coincides with the results of a cross-cultural study of Japanese college students (Tsuboi, 2013). Compared to college students in other Eastern Asian countries, Japanese students are mostly categorized as "collegiate" types who tend to enjoy social life on campus more than academic achievement. It

would seem helpful and important for study abroad administrators to consider different ways that they can take advantage of peer influence and design programs that take this dynamic into account. Two ways to do this would be to work directly with student clubs to design study abroad programs and make sure institutions take full advantage of returning students to expose current students to the benefits of study abroad.

Another cultural pattern found in this study was the dependent relationship between parent and child in Japan. Historically, beliefs about cultivating closeness between parent and child have been emphasized in Japanese parenting, which is believed to be a precursor for academic success in Japan (Rothbaum et al., 2000). The pattern of contemporary Japanese parents and children, revealed in this study, is a desire to remain dependent and an experience of separation anxiety when considering study abroad. Although 'helicopter parents' who pay extremely close attention to a child's academic experience also exist in Western contexts, Japanese parenting may be slightly different because many children also prefer to remain dependent. Rather than resisting parental involvement as an intrusion into the student's life and an obstacle, study abroad administrators may need to consider creative ways that they can persuade parents of the value of study abroad and team up with them in their efforts to convince students to study abroad.

Based on the findings from this research and our review of the current literature, we would like to make a few recommendations for higher education professionals overseas, who are interested in attracting more Japanese students. First, it may be helpful to remain as flexible as possible regarding English language requirements. While Japanese students do not generally score as high on the TOEFL compared to student in other nations, Japanese students receive a lot of English training from elementary school and are often 'false beginners'. So, for example, it would be helpful to consider accepting other English standardized tests such as *Eiken,* an English language test conducted by a Japanese public-interest incorporated foundation. Second, given the situation with COVID, universities should seek to bridge students into their degree programs by offering online courses in partnership with Japanese universities. Online coeducational courses are currently being strongly promoted in Japan (Porter, 2020). There are advantages to starting a degree online before traveling to the host country, and that configuration should be creatively pursued.

## CONCLUSION

Several limitations of this study should be kept in mind. First, the sample was small and not random. As mentioned earlier, the lack of staffing at international offices in Japanese higher education made it difficult to recruit participants. Some of the study abroad administrators were also teaching faculty, along with responsibilities related to study abroad, which subsequently made it difficult to spare time for in-depth interviews. In addition, many international offices at Japanese universities post limited email information for their staff and, therefore, it was difficult to recruit many participants. Second, all but one of the participants were from top-tier universities and were recruited from the largest international educators' organization, NAFSA. This may have excluded some personnel from international offices with smaller university budgets that cannot support NAFSA membership and conference participation. The findings of this research might have been different if the participants had been from universities with lower financial resources, prestige, and support from the Japanese government.

Despite the limitations mentioned above, to the authors' knowledge, this was the only study that analyzed factors associated with Japanese students' decision to study abroad from the perspective of professionals who promote, encourage, and support student decisions to study abroad. In addition, the participants' bi-cultural experience (Japan and Western contexts) contributed to their ability to critically evaluate the characteristics of current Japanese college students as well as on-going globalization efforts by the Japanese government, corporations, and higher education institutions through an implicit comparative lens. Further research is needed to develop effective strategies for encouraging Japanese students to study abroad through an increase in sample size and by systematically recruiting the study abroad administrators from a wide range of regions and levels. Such research would not only extend our understanding of globalization in Japan, but also inform policy and practice in ways that will encourage more study abroad participation in Japan and other nations.

## REFERENCES

Arima, A. (2014). Why Japanese university students are introverted: Scale constructs and sex differences [Japanese]. *The Bulletin of Tokyo Women's University, 65*, 63–82.

British Council (2014). *Japan: Debunking the "inward looking" myth*. Retrieved from https://www.britishcouncil.org/education/ihe/knowledge-centre/student-mobility/report-japan-debunking-inward-looking-myth

Bronfenbrenner, U. (1986). Ecology of the family as a context for human development: Research perspectives. *Developmental Psychology, 22*, 723–742. http://dx.doi.org/10.1037/0012-1649.22.6.723

Creswell, J. W. (1998). *Qualitative inquiry and research design: Choosing among five traditions*. Sage Publications.

Davies, R. J. & Ikeno, O. (2002). *The Japanese mind: Understanding contemporary Japanese culture.* Turtle Publishing,

Education Testing Service (2019). *Test and score data summary for TOEFL iBT tests*. http://www.ets.org/s/toefl/pdf/94227_unlweb.pdf

Grimes-MaclLellan, D. (2017). Challenges for study abroad in contemporary Japan: Inward-looking youth or cost-conscious consumers? *Study Abroad Research in Second Language Acquisition and International Education. 22*, 723–742. https://doi.org/10.1075/sar.16019.gri

Hayase, H. (2017). Achievements and problems of the international study abroad curriculum: Fostering global citizens in the liberal arts course at Saga University [Japanese]. *Journal of the Organization for General Education, 5*, 99–114.

Index Mundi. (2020). *Purchasing power parity*. https://www.indexmundi.com/g/g.aspx?v=65&c=ja&l=en

Institute for International Education. (2019a). *Project atlas global mobility trends*. https://p.widencdn.net/rohmio/Project-Atlas-2019-graphics

Institute for International Education (2019b). *Open door fast facts 2019*. https://opendoorsdata.org/fast_facts/fast-facts-2019/

Japan Student Services Organization (2020). *JASSO outline 2019-2020*. https://www.jasso.go.jp/sp/en/about/organization/__icsFiles/afieldfile/2019/07/12/e2019_a4_0702s.pdf

Kawano, Y. (2013). Nihonjin gakusei no kokusai sikousei [Global orientation of Japanese students]. In M. Yokota & A. Kobayashi (Eds.), *Internationalization of Japanese universities and the international mindset of Japanese students* (pp. 157–178). Gakubunsya

Kuckartz, U. (2014). *Qualitative text analysis: A guide to methods, practice and using software*. Sage

Kuromiya, A., Hashimoto, Y., & Kanazawa, M. (2016). The issues and realities of university students studying abroad: Based on a survey aimed at students [Japanese]. *Journal of Kihi International University*, *26*, 121–138.

Lassegard, J. P. (2013). Student perspectives on international education: An examination into the trend of Japanese studying abroad. *Asia Pacific Journal of Education, 33*, 365–379. https://doi.org/10.1080/02188791.2013.807774

The Ministry of Education, Culture, Sports, Science and Technology. (2018*). Document 6. Proposal for agenda and procedures related to higher education internationalization [Japanese]*. https://www.mext.go.jp/b_menu/shingi/chukyo/chukyo4/kondankai/attach/1408634.htm

The Ministry of Education, Culture, Sports, Science and Technology. (2020). *About Tobitate! (Leap for Tomorrow) Study Abroad Initiative* [Japanese]. https://www.mext.go.jp/a_menu/kokusai/tobitate/index.htm

Nakai, K. W. (1980). The naturalization of Confucianism in Tokugawa Japan: The problem of Sinocentrism. *Harvard Journal of Asiatic Studies, 40*, 157–199. https://doi.org/10.2307/2718919

OECD (2015). *Education policy outlook Japan*. http://www.oecd.org/education/Japan-country-profile.pdf

Ota, H. (2013). *Nihonjin gakusei no uchimuki shikou saikou* [Rethinking of Japanese students' inwardness]. In M. Yokota & A. Kobayashi (Eds.), *Internationalization of Japanese universities and the international mindset of Japanese students* (pp. 67–93). Gakubunsya

Ota, H. (2014). A study on the inward-looking of Japanese students: Revising students' international mindset with existing data [Japanese]. *Ryugaku Kouryu*. *40*, 1–16. https://www.jasso.go.jp/ryugaku/related/kouryu/2014/__icsFiles/afieldfile/2015/11/18/201407otahiroshi.pdf

Park, Y. K. (2016). Japanese young people's domestic directivity based on data: A comparative analysis between Korea and China [Japanese]. *Journal of East Asian Studies, 14*, 251–260.

Porter, R. (2020). Online education at U.S. universities, before and after COVID 19: The challenges and opportunities for international students [Japanese]. *Ryugaku Kouryu*. *116,* 1–11. https://www.jasso.go.jp/ryugaku/related/kouryu/2020/__icsFiles/afieldfile/2020/11/06/202011richardporter_1.pdf

Rappleye, J., & Vickers, E. (2015, November 6). Can Japanese universities really become super global? http://www.universityworldnews.com/article.php?story=20151103154757426

Rothbaum, F., Pott, M., Azuma, H., Miyake, K. and Weisz, J. (2000), The Development of close relationships in Japan and the United States: Paths of symbiotic harmony and generative tension. *Child Development, 71*, 1121–1142. https://doi.org/10.1111/1467-8624.00214

Schwandt, T. A. (2001). *Dictionary of qualitative inquiry* (2nd ed.). Sage.

Seidman, I. (1998). *Interviewing as qualitative research: A guide for researchers in education and the social sciences* (2nd ed.). Teachers College Press.

Shimmi, Y., & Ota, H. (2018). "Super-short-term" study abroad in Japan: A dramatic Increase. *International Higher Education, 94*, 13–15. https://doi.org/10.6017/ihe.2018.0.10559

Takai, T. (2016, March 25). Japan urged to embrace diversity management as working population shrinks. *The Japan Times*. https://www.japantimes.co.jp/news/2016/03/25/business/japan-urged-embrace-diversity-management-working-population-shrinks/#.Wxl9u0gvw2x

Takehara, S., Wright, F., Kawaguchi, Y., Ishida, Y., Morio, I., & Tagami, J. (2016). Characteristics of undergraduate dental students in Japan: English competency and willingness to study abroad. *International Dental Journal, 66*(5), 311–317. https://doi.org/10.1111/idj.12244

Tsuboi, K. (2013). *Nihonno daigaku to daigakusei bunka* [Japanese universities and university culture]. In M. Yokota & A. Kobayashi (Eds.), *Internationalization of Japanese universities and the international mindset of Japanese students* (pp. 39–66). Tokyo: Gakubunsya

Tufford, L., & Newman, P. (2010). Bracketing in qualitative research. *Qualitative Social Work, 11* (1), 80–96. https://doi.org 10.1177/1473325010368316

World Economic Forum (2015). *Global gender gap report*. https://www.weforum.org/reports/global-gender-gap-report-2015/

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# An examination of policy in practice: A case study of inclusionary internationalization

**Sosanya M Jones**

Howard University, US: *sosanya.jones@howard.edu*

*This article focuses on the perceptions of institutional practices and practices to nurture greater cross-cultural learning and inclusion by highlighting findings from an in-depth qualitative case study conducted at a prominent Canadian research university with a stellar reputation for recruiting and providing an inclusive environment for international students. Using a conceptual framework drawn from institutional diversity theory, this study examines perceptions by students, faculty, and staff of institutional practices and strategies aimed at nurturing inclusion for international students in order to glean insight about whether this institution is perceived to embody its espoused value of inclusive internationalization. The findings demonstrate that when internationalization is upheld as a core value of an institution, that value can be witnessed in the artefacts and rhetoric of an institution. While the rhetoric may influence the creation of additional services to support international students and faculty, it is limiting in its ability to produce inclusive environments, especially for populations of colour. The implications of these findings are discussed.*

*Keywords: internationalization; diversity; higher education; case study*

## INTRODUCTION

Many higher education institutions are currently adopting and expanding strategic plans and initiatives to promote and integrate internationalization for greater cross-cultural communication, learning, and empathy (de Wit, 2019). Internationalization can be defined as "the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of postsecondary education". (Knight, 2015, p. 2). There is a global movement towards designing and practicing "inclusive internationalization", which includes: consideration for different proficiencies and comfort levels in speaking the language, understanding of the national, local, and institutional context and processes; and financial obligations and challenges associated with transitioning and living in a foreign country; the psychological stress and toll of migrating into a foreign educational system with or without family, and the stereotypes, stigma, and discrimination that may be experienced by those who are not domestic (Baum & Flores, 2011; Shankar et al., 2016). This study seeks to address gaps and challenges that international students and faculty experience at their host institutions. Failure to address the needs and challenges international students and faculty experience

can result in high attrition rates, poor recruitment, and a loss of opportunity for shared interaction and knowledge sharing (Bhandari, 2018; Guo & Chase, 2011). Empirical examination of the implementation and lived experience of these policies can illuminate gaps between policy and practice.

Canada has a global reputation as being one of the most culturally diverse and progressive higher education systems in the world because many provincial governments within Canada have adopted international education policies and/or make special investments in internationalization initiatives (Guo & Guo, 2017). However, this does not necessarily guarantee that higher education institutions will create supportive environments for international students or cultivate intercultural experiences and learning. In fact, it has been noted that despite widespread institutional policy on internationalization, there is still a noticeable gap between rhetoric and reality (Guo & Chase, 2011; Haapakoski, 2020). There is also evidence of a growing backlash towards immigration and signs of increasing xenophobia within certain segments of Canada's general population (Lupart, & Webber, 2012; Mahoney, 2010). Additionally, the scholarship on internationalization has highlighted that with the increased access and globalization of the Canadian higher education, there has also been a rise in xenophobia and racism (Harrison & Peacock, 2009; Wilkes et al., 2006; Zaman, 2010), particularly in provinces where governance is historically more conservative (Levitt, 1997; Wrecking, 2013). In this paper, I investigate this gap in one higher education institution in Canada by addressing two research questions. First, how well are international and intercultural values integrated into the purpose, functions and behaviours of the institution? Second, what are the perceived challenges that hinder the institution's integration of purpose, functions, and delivery of "inclusive internationalization"?

There have been many case studies on internationalization within Canada, but they usually focus on one particular actor or segment within an institution, such as students, or a singular program and/or practice, the exception to this being Haapakoski's (2020) in-depth examination of obstacles to promoting inclusive internationalization. In that study, Haapakoski identified how neoliberalism supported Eurocentric ideas about a market economy that employs the language of education for a public good while also using education for entrepreneurial interests that ignore consideration for marginalized populations and practices that promote inclusion. This study builds upon that work by examining the ways in which different populations connected to internationalization experience institutional policies in practice.

Single case studies can be used to expand the literature on internationalization which heavily employs comparative integrative approaches. Research methods in comparative international social policy in particular, tend to cluster around case studies that explore causal explanations relative to applied knowledge and theory building (Jurkowski & Tracy, 2001). This case study will highlight perceptions of the implementation of internationalization policy espoused by a university system situated within a wider provincial system that has enacted internationalization policies for higher education. Future researchers will be able to use this single case study in comparative work to assess whether the ways internationalization is realized here are comparable to other cases. While this is a single-case qualitative study, it is derived from a comparative lens. Wolf & Baehler (2018) state single case studies in diverse settings outside of one's own environment can be used for comparative study. Single case studies provide opportunities for the researcher to glean new lessons about existing programs, policies,

and processes that can be transferred or adapted to one's own environment. At the time this study was conducted, I was working at an American university that has a small but very visible minoritized group of Saudi Arabian and Chinese students who were struggling to acclimate. My institution had very few policies and practices to address their needs and there was increasing hostility from faculty and students against these populations. As an American, I was not familiar with formal *state sponsored* internationalization policies connected to a university directive because this did not exist in my state, and I felt that the lessons gleaned from this particular Canadian university could possibly be used to promote greater inclusion at my own university.

## THE PROVINCE

The university of focus in this study is situated in a conservative province which has steadily prioritized internationalization in higher education. In the past decade, there has been an exponential increase in the number of bilateral arrangements between this province and other Canadian provinces to improve internationalization. For example, this particular province has partnered with neighbouring provinces to streamline credit transfer among jurisdictions to help international students navigate between institutions. This province has also *allocated funding to* recruit graduate students and market their higher education institutions in various jurisdictions as well as shaped legislation to guide higher education and international education. The minister of education plays an active role in providing direction to the province for economic diversification and social policy, with a special focus on business and higher education. The province has even produced a framework for how internalization should be approached and implemented.

Using a conceptual framework drawn from institutional diversity theory, I examined the institution's policies and practices. This included engaging in document analysis and interviewing students as well as the faculty, administrators, and staff responsible for implementing internationalization efforts. My primary goal was to examine whether internationalization is integrated throughout the institution or relegated to a few specialized offices, as well as to reveal the challenges and gaps that might prevent the institution from fully realizing their goal of *inclusive* internationalization.

## CONCEPTUAL FRAMEWORK

My conceptual framework draws upon Chang's (2002) institutional diversity theory, which asserts that, for an institution to have true inclusion, multiple areas of the institution must be transformed. These areas are:

1) *Historical* – describing the past behaviour, policies, and perspectives of the institution towards students of colour: in other words, an institution's legacy of racism and exclusion.

2) *Structural* – the college's representation of students of color or the institution's current "face" of diversity.

3) *Psychological* – the perceptions, attitudes, and overall "atmosphere" of the institution for diverse populations.

4) *Behavioural* – the degree of "action" being taken towards including different ideas and needs in campus services and course offerings.

Chang provided a model of diversity that showed how addressing these four defining areas could mean the difference between preserving the status quo and *transforming* institutions so that they become truly inclusive. This theory of institutional transformation has been used in several studies, including Núñez et al.'s (2015) study on Hispanic Serving Institutions, which demonstrated that the level of student engagement was directly related to the level of transformation in each category. Denson and Chang (2015) also found that an institution's capacity to address these categories within institutional transformation theory were vital for nurturing cross-cultural communication and relationships.

This paper takes a constructivist view of learning which is defined as a paradigm of learning that ascribes the acquisition of knowledge as a result of how one interacts with their environment. Past experience and knowledge of learning can be blended and/or reshaped by their interactions with others, including classmates, teachers, and experiences in the environment. Consequently, those who are designated as learners can also be teachers and shape the knowledge of their instructors and classmates (Ellison & Wu, 2008). This conceptualization of learning as contextual is very much connected to the concept of fragmentation and internationalization. Fragmentation is concerned with institutional settings and the ways in which different parts of institutions exist and interact. Most of the fragmentation literature on internationalization agrees that distinct parts of these systems do not interlink or integrate the way they claim to espouse and aspire to.

## METHODOLOGY

Qualitative study is appropriate for this topic because it lends itself to a more in-depth understanding of the various institutional practitioners' perceptions about inclusion policy and practice, and also the context in which these institutional policies and practices are implemented. According to Maxwell (2012), understanding participants' perspective is "not simply their accounts of these events and actions, to be assessed in terms of truth or falsity; they are part of the reality that you are trying to understand, and a major influence on their behavior" (p. 221). I utilized a case study design to examine how internationalization is perceived and enacted within a bounded system. Yin (2017) describes case study as an "empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident" (p. 5). In this case, the bounded parameters are the institution which is situated within a particular Canadian province that has been traditionally conservative. This particular province is similar to other Canadian provinces with large research universities in that it is conservative but publicly committed to implementing internalization in higher education, however this province is regarded as more conservative and rural than others that contain similar flagship institutions.

In order to gain a better understanding of the perceptions about policies and practices designed to promote greater inclusion and positive intercultural interaction, I conducted semi-structured interviews with key persons responsible for developing and enacting inclusionary policy and practice within the institution to capture their understanding and experience of the development and operation of inclusion policies and practices (see appendix for protocol). I also sought to understand what meaning they were making of the messages they received from the province, and their institutions about how to

promote inclusion and mitigate xenophobia. This inquiry gleaned insight into the experiences some institutional leaders and practitioners are having within their unique institutional context and how these experiences shape perceptions about what strategies are used to cultivate greater inclusion.

## Data sources

I collected data from a number of sources to give me a more robust and comprehensive picture. Semi-structured, in-depth interviews allowed me to examine the lived realities of various types of institutional members and their experience of internationalization. Twenty-one university students and staff were identified through a stratified snowball sampling, representing a cross-section of disciplines, academic, and student affair units as well as a broad and balanced range of participants across gender, member type, race, rank, and disciplines. I did not stratify according to ethnicity and nationality but I did strive to talk to a diverse range of individuals who represented differences across both of these categories. Respondents included one provincial government officer; three senior administrators; three student affair administrators; two academic affair administrators, four faculty members, four students; and four alumni. The interviews lasted between 30 and 45 minutes, took place at a location chosen by the participant and were digitally recorded. The subject of the interviews was centred on the university's internationalization policies and practices, and experiences and observations of international and domestic interactions and communication. All of the international students, faculty, and alumni are classified as either an immigrant or as an F-1 international student.[1] The other participants were either domestic, permanent resident, or naturalized. Pseudonyms are used to mask participant identities and participants are only referred to by their role as a student, staff, faculty, administrator, senior administrator, or provincial officer.

Triangulation was used through the use of document analysis, drawing on archival internationalization program development reports, brochures, fliers, student manuals, and websites, and departmental meeting notes. Criteria for documents included the document's representation of particular efforts to promote internationalization, international services, and intercultural awareness. Additionally, documents designed for general populations (e.g. the student manual and general university marketing) were examined for language pertaining to internationalization, global outreach, and intercultural experiences and learning.

## Data analysis

Dedoose software was applied to catalogue and code all data collected, including document analysis, observation, and interviews. Interview data was coded using Saldaña's (2015) approach of first and second cycle coding. For the first cycle coding, I developed thematic and in vivo codes in order to sort through my data. This approach allowed me to search for ideas directly related to both my framework and research questions. In the second cycle of coding, I used descriptive, emotional (labelling of expressed feelings and emotions), and axial coding. Next, I constructed analytic tables

[1] An F-1 visa is usually issued to international students from the United States who are attending an academic program or English Language Program in North America.

and reduced my code list using axial coding. These axial codes were then used to form categories for constructing themes.

Altheide's (1987) method of ethnographic content analysis (ECA) was used for document analysis. Ethnographic content analysis is "used to document and understand the communication of meaning, as well as to verify theoretical relationships" (p. 68). In the tradition of ECA, a constant comparison method was employed to search for words, phrases, and concepts in the artefacts available throughout the University pertaining to internationalization, inclusion, and diversity. I also took note of the locations, accessibility, frequency of use and distribution of these items as well as who was represented in these artefacts.

## FINDINGS

The data reveals a nuanced and complex picture of how the mission of inclusive internationalization is perceived and experienced by different constituencies within the university.

### Integrated purpose

Internationalization is well-integrated into the mission of the studied university's internationalization goals as expressed in the following statement: "Driven by the . . . vision to connect with the world, [we] works with a broad range of international and external stakeholders to support the creation of an internationally vibrant learning and research environment." (University's website, 2017). This mission is demonstrated through a high degree of visibility of rhetoric addressing internationalization in various media, the campus grounds, and documentation. Throughout my survey of online resources and the campus community, I found posters, brochures, and virtual advertisements for centrer, courses, certificate programs, and activities oriented around international students, global educational experiences, and programming from international perspectives. Additionally, the institution's strategic plan for internationalization is well-known by different constituencies at all levels. All of these efforts demonstrate that internationalization *as a mission* is well integrated into both the university's policies and practices. It is also evidence that considerable effort has been made to address practices and behaviour that supports inclusive internationalization (the behavioural component of institutional diversity theory) and images, discussions, and language that promotes inclusion (the psychological component of institutional diversity theory) of institutional transformation.

### Fragmented delivery

The university's attention to the psychological and behavioural components of transformation has produced some impressive results. The institution has established three centres designed to foster global citizenry, student support, and faculty teaching for better learning across cultures. There is also a web page dedicated to international news and resources. The university has devoted substantial resources to recruiting international students, which has resulted in considerable gains in structural diversity. International students make up over 20% of the university's total undergraduate population, while a staggering 75% of all graduate students are international.

While all of these results offer promise of a truly integrated internationalization effort, some gaps were observed as well. For example, though all of the participants in this study acknowledged that the university is very vocal and demonstrative about its commitment to internationalization, few of the international students I interviewed found the available support services helpful. There were some exceptions. Tim, a Black international doctoral student, had to say about the university's international support services office:

> Emails were sent about the orientation, which was very good. They talked about the school gave us sort of an orientation. So that we know how to navigate around the institution and around certain issues. . . . [I]t was helpful.

But while finding the orientation helpful, Tim also expressed confusion and a lack of support in other areas:

> I wasn't even aware that [work] offices are available, nobody told me. [A fellow student] helped me get an office . . . If I didn't meet her, I wouldn't have known. I thought there should be a sort of orientation process where you tell postgraduates things like this and that is available, but I had to find out through a great friend almost accidentally. It makes you wonder how much other stuff you don't know.

This sentiment of not being informed by the University was commonly expressed by the interviewed international students. Three out of four of the students said they had little to no contact with international support services. When asked about support, all interviewed international students said that they relied on their immediate peers, faculty, or staff. This experience is exemplified in the following account offered by Catherine, a Black international doctoral student:

> I would say that my graduate coordinator [has been helpful] . . . I'll [call] her to be courteous and helpful and generally [because] the other staff are . . . having an off day or whatever. I don't know that I put it to me, being an immigrant or whatever, but I haven't really had to interface with a lot of the other [staff]. But the coordinator handles the stuff for our admission and . . . she has been really good.

Additionally, while many formal structures dedicate support to international students and intercultural learning, centres and programs designed to promote intercultural learning for domestic students and faculty were both less prominent and less utilized. One White domestic academic administrator, Victoria, explained:

> If I look at the number of [domestic] students that are actually going abroad . . . less than 300 are actually taking advantage of those in any given year. That's a very small number but also, it's pretty much 3% of our students going abroad, which is pathetic . . . and the majority of them are going for a really short term of one month or less.

Both Rumi, an international student support services administrator, and Frances, a faculty support services administrator described a lack of interest and participation from domestic students and faculty in intercultural learning experiences. With such a large student population, the lack of participation and brevity of participation may point to a lack of real institutional commitment and openness to intercultural learning. It could also be the result of what Archer, Jones, & Davison (2010) found, namely that when services are not fully integrated, it negatively affects student engagement and interest with the available intercultural supports.

## The rhetoric and branding of acceptance

In terms of artefacts and my own observations, I found that the institution was very self-aware and proactive about creating artefacts and branding that depicted inclusive internationalization. Examples include the institution's website, programmatic activity advertising both online and in print, the pictures used to decorate the hallways, and the types of events that were sponsored. Students and faculty from all over the world, representing different ethnicities were represented in all marketing and programmatic events. On its face, the institution appears to be accepting of non-domestic participants, even celebrating their presence. This assessment of its branding was confirmed in several of my interviews with students, administrators, and faculty.

Going beyond "the face" of the institution, I found that, overwhelmingly, the institution was perceived as *structurally* diverse for two-thirds participants (mostly White), but not all. Indeed, 100% of the participants acknowledged that cultural difference and diversity are often spoken about, and all of the participants I interviewed valued international and intercultural exchanges and learning. While this is very promising, there was a significant gap in perception about how well they do that for different groups. In particular, there was a perception among persons of colour, domestic and international, and Indigenous participants, that the institution is not doing well in nurturing the psychological and behavioural components of diversity. Ava, a domestic Black faculty member, had the following to say about the institution's psychological and behavioural components of diversity:

> I don't think people say, "Oh, you people from the south are not much good." It's not as overt as that, though I'm sure there may be some . . . It's what are the attributes that are regarded as positive for a grad student to have. Then from that, certain things begin to accrue. . . . [P]eople whose primary language is English . . . Somebody coming from the States or from the UK or somewhere like that would be privileged in terms of, "Okay, [they] can speak the language".

Many participants also described stagnation and even resistance from the university in addressing *historical* exclusion, which inevitably affects conversations about existing gaps in supporting a diverse international student population. Relatedly, while there have been efforts to address psychological diversity through the promotion of inclusive images and internationalization initiatives—which is evident by the numerous artefacts found both on the grounds of the campus, and in print and digital form—there are still perceptions of a chilly atmosphere in some areas of the university, especially against minoritized linguistic groups. An Asian permanent resident administrator, Rumi, described troubling behavioural deficits in support for students with linguistic differences:

> I think that when there is a cluster of international students from one language group in their class, some professors feel that it affects their teaching style, it affects their classroom management, but they're not prepared to change anything because as far as they're concerned, those students shouldn't even be in the university, right?

Additionally, Black international and domestic students as well as Indigenous students overwhelmingly perceived racial bias in their treatment. The Black participants I spoke to, in particular, were vocal about their experience of the psychological and behavioural environment of the campus. Kia, a Black international doctoral student and staff member, described her ex-husband's experience:

> I think on a whole, African students who come from Africa are treated much worse here. I think there's definitely a hierarchy of race that occurs . . . I mean my ex-husband is Ethiopian. The experiences that he's had have been awful.

Arnold, another Black international doctoral student, described his experiences of racism:

> [I]f you are white, no one will ask you where you are from, but if you are black, that question will come. . . . It's because of my skin color that they ask me where I am from. If I didn't carry a black skin, if it was white, no one will ask. It's like people just want to make you feel like you can't be from here.

Interestingly, though Indigenous populations attend the university as domestic Canadians, they were often mentioned in conversations about marginalization. A White former domestic student and now administrator, Brenda, had this to say about the behavioural diversity of the institution:

> There's pervasive racism . . . I think it's less overt than it maybe was 50 years ago, but, like, I don't know, it's just the sense that people are more annoyed by black people here. But I think, like, our most marginalized group by far would probably be native people.

The disconnect between students and the services designed to help them may exacerbate these different perceptions among different groups of students about the psychological and behavioural components of the campus environment. The divergent views between different stakeholders on the function of internationalization highlight one of the primary challenges of these policies at this institution.

## Fragmented functions

Competing views emerged about how to best provide support for international students, as well as what internationalization actually means among administrators, faculty, staff, and students. Senior administrators were more likely to express a more positive and altruistic view when defining internationalization and how the university embodies it. Donna, a White domestic senior administrator, explained:

> Our goal is to internationalize the student experience. [It is] not a separate dimension of what the university does. It's a pervasive dimension of whatever the university does. The international is the vehicle. It is one vehicle to enhance the quality and relevance of teaching/learning, research and service.

Mid-level administrators and faculty expressed more cynicism, with the majority describing internationalization as a neo-liberal concept that is designed to not only increase global competitiveness and profit for universities but also a mechanism for improving the labour force and economy of the nation. As Ava, put it:

> I think [universities] often see themselves as doing a service for these countries where students come from. They see it as a market. I know that as well as degrees, they're very keen now to sell certificates and webinars. All of these now become part of what's for sale. It breaks down knowledge into parts that can then be sold to the international market. The other issue is that, I think, with internationalization as well is that there is a shortage of labour, really, within Canada. The population is aging.

Students overwhelmingly shared this cynicism, although they did not use the term "neo-liberal". The following quote from Kia, was representative of all four of the international students I spoke to and two out of three of the domestic students I spoke with:

> I mean, really, at the university, internationalization just means bringing in international students it seems to be and to get them to pay more money to subsidize things. That's what that means here, which is deeply problematic.

These differing perspectives on internationalization appear to be, at least in part, a function of a very siloed system of support services, that is to say, they are operating independently with very little interaction. This limits their reach and ability to collaborate and share knowledge.

While there are many institutional structures in place to foster international support and intercultural learning, there are both geographic and theoretical barriers to these structures engaging collaboratively with each other. The university's campus is large and the three international and intercultural centres are all situated very far from each other and do not collaborate on most activities. Outside of the three centres, there are a number of administrators and staff who operate independently to support internationalization efforts, either through recruitment, retention, or coordinating intercultural learning experiences. This departmentalization has resulted in a massive hodgepodge of autonomous services that have little to no communication with each other, which directly affects the extent to which the psychological and behavioural components of institutional transformation can be fulfilled. However, at least one administrator felt this distribution was a positive attribute. Isabelle, a White domestic faculty administrator, explained:

> I actually think it's a good thing we have so many different offices addressing [internationalization], because it's such a complex thing. I wouldn't want anyone to do everything. I like that it's starting to appear in lots of different places and so that means lots of people are talking about it, right?

## DISCUSSION

As the world becomes more connected globally through technology and trade, the demand grows to make higher education more accessible, marketable, and inclusive for all students. Well-implemented internationalization policies can enrich learning experiences, engagement, and empathy. In this case study, I examined perceptions about internationalization as an integrated mission within a Canadian post-secondary institution to address gaps in perspectives and policy approaches.

This study has some limitations that should be noted. First, while case studies are useful for highlighting examples of broader phenomenon, they cannot be generalized. In particular, the unique context of this particular province, which has explicit internationalization goals and a high calibre and well-funded institution, may present some features that are not replicable or recognizable in other cases. Also, because this is a qualitative study, I spoke to a small subset of the university population and there may be even more nuanced trends that this approach could not capture.

There are many lessons, though, that were gleaned from this study. I discovered that when internationalization is upheld as a core value of an institution, evidence of that

value can be witnessed in some of the psychological areas of institutional transformative theory in the form of artefacts and rhetoric. Attention to this psychological component of institutional diversity can also lead to better behavioural diversity in the form of additional services and programmatic experiences designed to foster student and faculty support and intercultural learning. This may lead to increased intercultural interaction and thus promote the development of even better attention to the psychological component of institutional transformation.

However, this may not be enough. Lambert and Usher (2013) found that while many international students felt that their university made efforts to be welcoming, they did not feel an overall sense of belonging. This may be an unintended product of Canada's decentralized education and federal government policy, which has resulted in what Schultz (2016) describes as a very different and contested context for implementation of internationalization policy. My study extends this research, demonstrating that while institutions may create structures and expose inclusive rhetoric, it may not necessarily lead to engagement or a sense of inclusion for *all* international students. While the existence of multiple services dedicated to internationalization may demonstrate commitment to the goal, there may need to be more reflection about collaboration and communication among different units within the institution to produce a more universal sense of inclusiveness.

The implications of these findings point to a need for more thoughtful deliberation about who is included in the design and facilitation of international services, professional development for faculty and staff, and general student services. It also suggests that more conversations and training around racial cultural competency and the intersectional ways multiple identities may shape a person's experience of the university should be considered.

Finally, and perhaps most importantly, these findings underscore that internationalization cannot become a vague buzzword in institutional transformation. This work aligns with the work of Andreotti (2010) and other scholars (e.g. Stein, et.al., 2019) who propose for more practical and responsive internationalization and frameworks for doing this work based on the advocacy efforts for ethical internationalization. In order to realize these efforts critical consideration must be given to gaps and biases related to race, ethnicity, and nationality in both policy and practice. This also means institutions must push beyond thinking only of the benefits international students accrue for the university, but how domestic students, faculty, and staff can benefit more from internationalization and other efforts toward inclusion.

## REFERENCES

Altheide, D. L. (1987). Reflections: Ethnographic content analysis. *Qualitative sociology,10*(1), 65–77.

Andreotti, V. (2010). Postcolonial and post-critical "global citizenship education". In G. Elliott, C. Fourali, S. Issler, (Eds.), *Education and Social Change: Connecting Local and Global Perspectives*,(pp. 238–250). Continuum International Publishing Group.

Archer, W. Jones, E., & Davison, J. (2010), *A UK guide to enhancing the international student experience*. UK Higher Education International Unit Research Series/6. https://www.academia.edu/2490093/A_UK_Guide_to_Enhancing_the_International_Student_Ex patience

Baum, S., & Flores, S. M. (2011). Higher education and children in immigrant families. *The future of children,* 21(1), 171–193.

Bhandari, R. (2018). Attracting and retaining global talent: International graduate students in the United States. *International Higher Education, 2*(93), 11–12.

Chang, M. J. (2002). Preservation or transformation: Where's the real educational discourse on diversity? *The Review of Higher Education, 25*(2), 125–140.

de Wit, H. (2019). Internationalization in higher education, a critical review. *SFU Educational Review*, *12*(3), 9–17.

Denson, N., & Chang, M. J. (2015). Dynamic relationships: Identifying moderators that maximize benefits associated with diversity. *The Journal of Higher Education, 86*(1), 1–37.

Ellison, N., & Wu, Y. (2008). Blogging in the classroom: A preliminary exploration of student attitudes and impact on comprehension. *Journal of Educational Multimedia and Hypermedia, 17*(1), 99–122.

Guo, Y., & Guo, S. (2017). Internationalization of Canadian higher education: Discrepancies between policies and international student experiences. *Studies in Higher Education,42*(5), 851–868.

Guo, S., & Chase, M. (2011). Internationalization of higher education: Integrating international students into Canadian academic environment. *Teaching in Higher Education*, 16(3), 305–318.

Haapakoski, J. (2020). *Market exclusions and false inclusions: Mapping obstacles for more ethical approaches in the internationalization of higher education*. [Dissertation, Faculty of Education, Values, Ideologies and Social Contexts of Education] University of Oulu Graduate School. http://jultika.oulu.fi/files/isbn9789526226637.pdf

Harrison, N., & Peacock, N. (2009). Cultural distance, mindfulness and passive xenophobia: Using Integrated Threat Theory to explore home higher education students' perspectives on 'internationalization at home'. *British Educational Research Journal, 36*(6), 877–902.

Jurkowski, E., & Tracy, M. (2001). Comparative international research. In Thyer, B. A. *The Handbook of Social work Research Methods* (pp. 455–472). SAGE Publications, Inc. https://doi.org/ 10.4135/9781412986182

Knight, J. (2015). Updated definition of internationalization. *International Higher Education*, (33). https://doi. org/10.6017/ihe.2003.33.7391

Lambert, J., & Usher, A. (2013). *Internationalization and the domestic student experience.* Toronto: Higher Education Strategy Associates.

Levitt, C. (1997). The morality of race in Canada. *Society*, *34*(6), 40.

Lupart, J., & Webber, C. (2012). Canadian schools in transition: Moving from dual education systems to inclusive schools. *Exceptionality Education International, 22(2), 8–37.*

Mahoney, K. E. (2010). Speech, equality, and citizenship in Canada. Common Law World. *Review*, *39*(1), 69–99.

Maxwell, J. A. (2012). Qualitative research design: An interactive approach (Vol. 41). Sage publications.

Núñez, A., Hurtado, S., Calderón Galdeano, E. (Eds.) (2015). Why study Hispanic-Serving Institutions? (pp 1). In *Hispanic-Serving Institutions: Advancing Research and Transformative Practice.* Routledge.

Saldaña, J. (2015). *The coding manual for qualitative researchers.* Sage.

Shankar, S., O'Brien, H. L., How, E., Lu, Y. W., Mabi, M., & Rose, C. (2016). The role of information in the settlement experiences of refugee students. *Proceedings of the Association for Information Science and Technology 53*(1), 1–6.

Shultz, L. (2016). Understanding the internationalization of education and its demand for a business of knowledge: Emerging issues and discussions in Canadian comparative and international education. In *Annual Review of Comparative and International Education 2015*. Emerald Group Publishing Limited.

Stein, S., Andreotti, V., & Suša, R. (2019). Pluralizing frameworks for global ethics in the internationalization of higher education in Canada. *Canadian Journal of Higher Education/Revue canadienne d'enseignement supérieur, 49*(1), 22–46.

University's website. (2017). University international. Masked.Wilkes, R., Guppy, N., & Farris, L. (2006, August 12). *No thanks we're full: Canadian views on immigration policy* [Papers presentation]. American Sociological Association Annual Conference, Montréal, Québec, Canada

Wrecking, H. C. I. (2013). The mess they made. North American integration: An institutional void in migration, *Security and Development*, *8*, 34.

Wolf, A., & Baehler, K. J. (2018). Learning transferable lessons from single cases in comparative policy analysis. *Journal of Comparative Policy Analysis: Research and Practice, 20*(4), 420–434.

Yin, R. K. (2017). *Case study research and applications: Design and methods*. Sage publications.

Zaman, H. (2010). Racialization and marginalization of immigrants: A new wave of xenophobia in Canada. *Labour / Le Travail*, *66*, 163–182

## APPENDIX: EXCERPT FROM STUDENT PROTOCOL

- I'd like to get your observations and perceptions of your experiences here as an international student. In terms of support, on a scale of 1-10, with 1 being the lowest, and 10 being the highest, how supportive would you say the university is for international students?

- Can you identify ways in which the university has been supportive?
- What services or resources do you utilize most to support your academic, emotional, and social needs here?
- What challenges have you experienced as an international student here inside of the classroom? Can you provide an example?
- What challenges have you experienced as an international student here outside of the classroom? Can you provide an example?
- In your opinion, how can the university better serve international students?
    - Probe: are there any evident gaps and challenges that the University has not addressed in serving international students?
- Does anyone have any additional thoughts, comments, or questions you think can benefit the staff, administrators, faculty here at the university about this topic?

Excerpt from Faculty & Staff Protocol

- When you think of internationalization, what comes to mind?
- To your knowledge, what specific student goals does the university have in terms of recruiting, supporting, and retaining international students?
- Where did you think these goals come from?
    - Probe: who helped shape these goals?

- Can you describe any institutional policies in place designed to support these goals?
- To your knowledge is there any academic policies that govern how faculty approach teaching and/or support international students? If so, please describe them.
- In terms of your curriculum and pedagogy, have you ever been advised and encouraged to adjust to accommodate international students?
- Regardless of advisement or encouragement, have you , have you ever adjusted your course materials or pedagogy to accommodate international students? In what ways?

---

*The International Education Journal: Comparative Perspectives* Vol. 19, No 2, 2020
http://iejcomparative.org

# Exploring gender differences in selection of subjects at higher education levels in the Maldives

**Aishath Shafina**
Ministry of Education, Maldives: *aishath.shafina@gmail.com*

*This paper sheds light on the higher education system of the Maldives from the perspective of gender equality between men and women. The findings presented in the paper are based on the results of a survey conducted among students enrolled in higher education institutions and on desk-research of relevant policy documents. The study explores the reasons for patterns of enrolment, reasons for selection of a particular study field and influence over the decision for selecting a discipline to study in higher education. Choices of whether they are simply down to the interest of the individuals or a matter of availability and affordability are explored in the research. Pressure from family, peers, work environment, stereotypes of masculine and feminine ideology, and availability of employment opportunities associated with particular disciplines are also discussed within the framework of this study in order to understand their relevance to deciding subject choice in higher education. The research shows that students' decisions are affected by reasons beyond subject or discipline. The study shows that a gendered dichotomy is very much prevalent in the higher education system of the Maldives.*

*Keywords: Gender, equality, subjects, higher education, discipline*

## BACKGROUND TO THE STUDY

Gender in this study is defined "as a social phenomenon, and as a social construct, as distinguished from sex which is biologically determined" (Momsen, 1991). Since gender is a social construct, gender equality is also broadly defined according to contextual definitions. Gender equality does not mean that men and women should become the same but that a person's rights, responsibilities and opportunities should not depend on whether they are born female or male (UN Women, 2020). It is important to understand the concept of gender mainstreaming when discussing balance in social systems. Gender mainstreaming is the process of assessing implications for women and men of any planned action, including legislation, policies or programs in all areas at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring, and evaluation of policies and programs in all political, economic, and societal spheres so that all people

benefit equally and inequality is not perpetuated (United Nations, 1997). The persistence of gendered paths in career choices have been reflected in the 2017 Global Gender Gap Report of the World Economic Forum (WEF), which states that, on average, men are underrepresented in the fields of education, health, and welfare whereas women are underrepresented in the Science, Technology, Engineering, and Mathematics (STEM) fields (WEF, 2017). Another study which shows the prevalence of sex segregation in higher education was by Gerber and Cheung (2008), which shows that, despite the increase in women in higher education, men and women are still concentrated in different educational programs and occupations (Barone 2011, Gerber & Cheung 2008). Mendick (2013) put forward three accounts to explain the gendered subject choices: biological account, social-psychological account, and feminist sociological account. Aigbomian's (2002) study, showed that it was simply a result of the 'capability' of the sexes. He observed that boys performed better than girls in science, technical, and Mathematics subjects.

A useful integrative framework for studying gender pathways and decision making draws on assumptions developed within an ecological systems perspective by Bronfenbrenner in 1977, life course theory by Elder in 1978 and socio-cultural Expectancy-Value Model of motivated choices by Eccles and Harold in 1991 (see Bronfenbrenner, 1977; and Wigfield & Eccles, 1995). Integrating these approaches can provide a better understanding of the dynamic interplay between social structures and individual preferences, values, and expectations over time and in context (Schoon, 2014). In effect, the authors argue that explanations of persisting gender differences in career choice and attainment refer to gender essentialism, socialization, outright gender discrimination and political processes. Wang and Degol (2013) offered six explanations for women's underrepresentation in STEM fields: (a) cognitive ability, (b) relative cognitive strengths, (c) occupational interests or preferences, (d) lifestyle values or work/family balance preferences, (e) field-specific ability beliefs, and (f) gender-related stereotypes and biases, because the size and composition of the STEM workforce continuously fail to meet the demand. More recent studies on subject choice have attributed the gender differences to factors such as attainment and aspiration (Parr, 2003).

Differences in 'innate' abilities and differences in preferences have been widely discussed. Favara (2012) found that grades have a major impact on choice of study. Favara argues that gender stereotyping also affects educational choices. A study by Card and Payne (2017) pointed out that readiness was a predictor of subject choice. They found that readiness to qualify to study in particular subjects plays a crucial role in progression to higher education. Subrahmanian (2005) proposed two determinants affecting subject choice: the extent to which girls and boys are streamed into determinate subjects through the way they are offered and performance in examinations or learning outcomes. Another critical argument that stems from the subject of underperformance in schools has more to do with society's norms about masculinity than with autonomy, hormones or brain structure; Pascoe (2007) stated that there are numerous examples of boys who strive for good grades as being labelled "pussies" or "fags" by their peers.

A significant proportion of the gender gap in earnings can be attributed to gender differences in subject majors. According to Jacobs (1996), choice of majors played a

larger role in career earnings, although they may influence later career earnings indirectly through occupational tracking. In the 1960s, these findings were quite evident when college enrolment was low. However, given recent trends, it does not account for the disparity.

An economic model which seeks to explain the gender differences is Expectancy-Value Theory developed by Eccles and colleagues between 1980 and 2000, on the motivation and the social factors influencing gender and ethnic difference in Mathematics, science, and information technology choices (Wigfield & Eccles, 1995). Eccles and Harold (1995) are of the view that people's choices (such as course selection, college major), persistence, and performance are strongly determined by their beliefs (which are feelings of importance and interest) and an individual's self-concept that consists of his or her belief of how skilled he or she is in terms of how well they will do on the activity and the extent to which they value that activity (Eccles & Harold, 1991). Eccles and Harold (as cited in Jacobs & Simpkins, 2005) stated that an individual's personal value attached to a task is influenced by multiple factors, such as satisfaction that the individual derives from a program chosen, the major program is seen as meeting the person's short-term and long-term goals, and encouragement or discouragement from an individual's parents, counsellors, friends in the context of school authorities, administrative structure, and policy for selecting a particular program. Therefore, because gender is a social construct, this belief is usually the result that affects representation in higher education.

Peer pressure has also been observed to play a crucial role in the selection of a major. Zolitz and Feld (2017) found that women who are randomly assigned to work with women peers were less likely to select male-dominated subjects, while males, when assigned to work with female peers, were more likely to select male-dominated subjects. A study found that women in male-dominated subjects are often faced with a difficult climate on campus. Murray et al. (1999), in their research on US higher education, showed that women were marginalized or harassed, for instance, by sexualized jokes. Another study showed that role models impacted on the gender gap in subject choice. The study found that when there were female role models, it raised students' interest in science-related careers, and it sharply reduced the prevalence of stereotypes associated with jobs in science and gender differences in abilities (Breda et al., 2020). According to UNESCO (2005), teachers and educators influence the gender roles of their students and thus have an impact on their educational outcomes. "We all grow up among the influence of our family and cultures, and as teachers, we may see ourselves, rightly, in the role of instilling cultural values in the children in our classes" (Kane, 1996).

It is crucial to understand how diverse contexts such as socioeconomic, political, and cultural settings affect individual's decisions. Although the general education system in Maldives is structured to provide primary and secondary education for all students with all subjects, it does not result in positive outcomes when it comes to enrolment in higher education and in the occupational structure of the Maldives. The Maldives National Bureau of Statistics (2020) revealed higher secondary education (grade 11 and 12 of general education) is low, with gross enrolment ratio below 50. Also, more females than males are enrolled in higher education. There are 23,345 females with qualifications of Diploma and above, while there are only 13,001 males with the same level of education. In addition, the National Bureau of Statistics revealed that the youth Not in

Employment, Education or Training (NEET) rate is more among females at 24.4% than males. To see it from the dimension of gender roles, there is a societal depiction associated with stereotypical roles suitable for both females and males that could have a bearing on their enrolment in higher education. As gender is a social construct, this societal depiction and biases have a considerable impact. A study conducted on depiction of roles of women and men in study materials in the Maldives in 2013 found that books of the local language and Islamic Studies focused more on gender stereotypes. Furthermore, given that colleges and universities in Maldives were established only after 2011, their expansion and inclusion is limited. A thorough investigation of the secondary factors for gender differences in selection of subjects would help policy makers understand how to better attain Maldives education goals.

## TRENDS IN OTHER PARTS OF THE WORLD

Worldwide, an assessment by Cambridge Assessment (2020) showed that 27.7% of females take Psychology, 24.1% Biology and 21.2% History. Only 5.3% females enrol in ICT and 6.1% in Physics. The same assessment showed that the highest male participation was found in Mathematics at 36%, followed by Business Studies at 22.6% and Physics at 20.6% (Cambridge Assessment, 2020). Furthermore, in a report published by the Institute of Physics in 2011, 6,159 girls took Physics A level, compared to 23,811 boys. In all OECD countries, girls perform significantly better at reading than boys; in Finland, Iceland, Slovenia, and Sweden, girls perform more than 50 points better in PISA than boys. In Chile, Mexico, and Korea, girls score approximately 20 points better than boys (OECD, 2015).

According to a study conducted by Achiam and Holmegaard (2000), more women than men attend higher education in Europe. However, even then, only one in three STEM graduates are female. In studying the context of the UK, Tonin and Wahba (2014) show that there is a gender gap in undergraduate Economics in the UK. According to Stevenson and Zlotnick (2018), Economics textbooks over-represent men among examples of policymakers, business leaders and even among fictional characters. The context of Spain shows similar results. Women have higher preferences and interest in the fields of humanities, social issues, and awareness, which are affected by social influence, especially of parents, and are concerned with being underrepresented or discriminated against in the field of their studies. It was also found that men are more aware of earning perspectives, family, and social acceptance when choosing their field. Gender stereotypes played a significant role (Valls et al., 2018) in an evaluation of the Dutch education system, where gender ideology shaped boys' occupational values and subject preferences, whereas, for girls, it shaped their competence beliefs. It showed that gender expectations were stricter for boys than girls and may prevent men from entering more feminine career tracks (Jaspers et al., 2016). Another Netherlands study by Thomas and Nierderle (2012) found that competitiveness was an important predictor of profile choice as gender. Their study showed that 23% of the gender difference in profile choice could be attributed to gender differences in competitiveness.

Similar to the situation in the Maldives, higher education in India has witnessed an expansion in women's enrolments in the recent past. A study of the Indian higher education system showed that family and the school were the key institutions that

shaped their choice of subject. Women's subject choices were also constrained by concerns relating to gender. According to the study, secondary factors, such as the institution, location and availability of hostel, were decisive factors (Gautam, 2015). According to Chanana (2001), women continue to cluster in subjects and disciplines traditionally regarded as "feminine", like Education, Health and Welfare, Languages and Arts. Chanana also showed that, since the expansion of jobs in Management and Chartered Accountancy in India, the representation of students, especially women, increased in the discipline of commerce. However, Engineering and Technology, Law, Commerce, and Veterinary Science remain predominantly male domains.

In the context of Pakistan, Javed (2018) stated that, often, parents impose their choice in the selection of subjects for their children without considering the interest of their children. A study conducted by Dom and Yi (2018) on the Cambodian education system found that factors, such as job market, the economic system and educational institutions, and society in general, affect women's qualifications and potential in the field of STEMS. Restricted freedom in the selection of subjects, patriarchal societal structure, social norms and culture, lack of STEM orientation from lower levels of schooling also have a significant impact on women's choice of studies at higher levels.

A study in Hong Kong showed that not only were female students less likely to take STEM-related subjects, but they were also more likely to leak out from the STEM pipeline than male students at later stages (Chan & Cheung, 2018). In studying the Malaysian context, Ismail (2015) found there is a varied difference in subject choice based on masculine and feminine roles. Furthermore, she also added that more male students represent subject choices like Engineering, Mathematics and Physics, and female students were specialized in Linguistics, Education and social sciences.

In studying why the number of male teachers was declining in the American education system, Patrick (2009) found factors such as subject matter, coaching opportunities and job opportunities affected student teachers' decisions. For those in the field, financial incentives were the determining factor. A study based in Georgia gave evidence that a number of females at tertiary education are more represented in Bachelors and Masters Programs; however, as for vocational programs, the number of males are higher. The study also showed that, in 2013, 76% of entrants who enrolled in humanitarian sciences were female, while 67% of enrolments in technical programs were male. The same study revealed that 80% of females chose literature, while 82.1% of males chose physics (Gorgadze, 2015). A study conducted by Basit Zafar (2009) showed that females care about non-pecuniary outcomes, such as gaining approval of parents and enjoying a job, while males value pecuniary outcomes, such as the social status of jobs, the likelihood of finding a job, and earnings profiles.

Studies based in Australian settings showed that subject choice in senior secondary school was related to differences in access to higher education, vocational education and training and employment outcomes (Fullarton & Ainley, 2000) Another study of how students made their subject choices (Atweh et al., 2005) observed that students make their selections based on multidimensional criteria: personal interests, perceived ability in the area, career aspirations, identified potential ability, as well as other constraints based on social factors, such as workload, peer pressure, and attitude towards the teachers. It was also found that, although most schools have scaffolding programs and activities to support students' selection of subjects, the accuracy of some information given may limit the options of students and put pressure on them (Atweh et al., 2005).

The context of the Middle East shows a different predictor. In studying the relationship between gender and subject choice in the higher education system of Saudi Arabia, Alwedinani (2016) found that internalizing of gender norms played a key role, while the patriarchal structure influenced a woman's subject choice, which was very much dependent on her father. Women who come from traditional families have no say, while those who come from non-traditional families exercise their agency through bargaining, resisting, and negotiating with the patriarchal system. In studying the Israeli educational context for subject choices by men and women, Egozi et al. (2014) found that, although young women have outpaced young men in terms of enrolment in education, girls and boys continue to study in gender-typical fields of study. They found that socialization mechanisms and rational choice motivations, particularly utility considerations and failure expectations, explain up to 40% of the gender-typical curricular choices.

Similar to other parts of the world, the gender disparity was prominent in the African region. In studying the Zimbabwean model of education, Mutekwe and Modiba (2012) identified, from in-classroom observations that, while displaying the graphical content relevant to the lecture, teachers displayed gender-stereotyped occupations. A study based in Nigeria showed comparable results; that is more boys than girls preferred technology courses, while more girls than boys preferred to study science education courses (Oriahi et al., 2010). While studying the gender disparity in Rwanda, the Ministry of Education (2008) stated that there is a growing divergence in subjects studied by boys and girls at the secondary level. They discovered that, in 2005, only 30% of girls studied Mathematics while 41% studied Biochemistry. Furthermore, only 14% of students were women in Electricity and 6% in General Mechanics and Automobiles. Another study, conducted in the Ghanaian context, showed that girls' programs of study are influenced by male relations, towards programs that are perceived to be less mathematically inclined (Agbley, 2015).

Such studies give evidence that gender imbalance in subject choice is a prevalent issue in all parts of the world, and that there is a need to understand the process of decision making regarding subject choice presented to and chosen by the students. As was stated in the above background section, the literature indicates that context plays a key role in defining the social construct of gender and its associated opportunities.

## OBJECTIVES AND METHODOLOGY

This study explored gender differences in selection of subjects at higher education levels in Maldives. Notably, the patterns of enrolment, reason for selection of the study subject and influencing/demanding factors were investigated to examine the underlying bases for the dichotomy of the selection of subjects by males and females. The research design was both exploratory and explanatory, supported by quantitative data from higher education providers as well as from a survey with standardized questions.

The data collection techniques included distribution of semi-structured, self-completed questionnaires. The questionnaire was designed to gauge the research objectives and consisted of closed and open-ended questions. Some institutes have campuses only in the capital city of Malé. Therefore, a hard copy of the questionnaire was distributed to the participants by their faculties/schools. For those institutes which had campuses outside of the Malé City region, an online Google form was utilized to collect data. All

students studying in the institutes were asked to voluntarily participate in completing the questionnaire. A total student population of 288 filled in the questionnaire. There are five public higher education providers and eight private higher education providers in the country. To maintain this ratio, data was also collected from two private higher education providers and one public higher education provider to discern the enrolment patterns in higher education. The scope of the study was limited to higher education and does not generalize its results to lower levels of education.

## ANALYSIS AND DISCUSSION

The Ministry of Higher Education is the authoritative body of the higher education service providers in the Maldives. Up until the establishment of the current government in November 2018, there was a Department of Higher Education responsible for this role. The data for this study was obtained in 2017 and early 2018. Therefore, the Department of Higher Education has been referred to as the authoritative body. Statistical data from the Department of Higher Education provides enrolment and graduate output details between the years 2013 and 2016.

Tables 1 and 2 summarises student enrolment and graduate output information by type of representative institute and sex. It is to be noted that record keeping, and data management systems are weak in regulatory authorities. Overall, female enrolment in higher education has been higher than male enrolment from the years between 2013 and 2016. The male graduate output is higher than female graduate output between the years 2013 to 2016 despite high female enrolment. More specifically, the statistics also show that female enrolment is higher in the private sector than in the government sector. Statistics from the years between 2013 and 2016 show that there were 57,390 students enrolled in higher education both in the private sector and government sector. Out of 33,750 students enrolled in the private sector between 2013 and 2016, females represented 57%, while males represented 43%. From the years 2013 to 2016, the government sector had a total graduate output of 9,787. Out of them, 7,104 were male graduates while 2,683 were female graduates. On the contrary, in the private sector, female graduates were 5,409, while male graduates were 2,515.

**Table 1: Student enrolment in higher education by sex**

| Year/Type of Institute | Student Enrolment | | | | | |
|---|---|---|---|---|---|---|
| | Male | in % | Female | in % | Total | Total in % |
| 2013 Government | 3019 | 39 | 4739 | 61 | 7758 | 100 |
| 2014 Government | 6795 | 56 | 5263 | 44 | 12058 | 100 |
| 2015 Government | 1860 | 19 | 1079 | 81 | 9764* | 100 |
| 2016 Government | 2755 | 72 | 1059 | 28 | 3814 | 100 |
| 2013 Private | 3391 | 45 | 4189 | 55 | 7580 | 100 |
| 2014 Private | 3493 | 43 | 4620 | 57 | 8113 | 100 |
| 2015 Private | 5524 | 44 | 6895 | 56 | 12429 | 100 |
| 2016 Private | 2207 | 39 | 3431 | 61 | 5638 | 100 |

*gender-disaggregated data missing from one/two institutions

**Table 2: Graduate output in higher education by sex**

| Year/Type of Institute | Graduate Output | | | | | |
|---|---|---|---|---|---|---|
| | Male | in % | Female | in % | Total | Total in % |
| 2013 Government | 1502 | 69 | 685 | 31 | 2187 | 100 |
| 2014 Government | 3492 | 73 | 1326 | 27 | 4818 | 100 |
| 2015 Government | 912* | 86 | 150* | 14 | 1062* | 100 |
| 2016 Government | 2110 | 76 | 672 | 24 | 2782 | 100 |
| 2013 Private | 812 | 48 | 884 | 52 | 1696 | 100 |
| 2014 Private | 677 | 43 | 901 | 57 | 1578 | 100 |
| 2015 Private | 1026 | 33 | 2129 | 67 | 3155 | 100 |
| 2016 Private | 569* | 28 | 1495 | 72 | 2064 | 100 |

*sex-disaggregated data missing from one/two institutions
(Source: current study, 2018)

Institute A is a public higher education provider. Table 3 shows that female enrolment was higher in all programs except for Quranic Studies, Sharia and Law, and Foundation Studies. This indicates that there is a presumption associated with male and female subject choices.

**Table 3: Male and female enrolment by field of study in the Institute A**

| | Quran | | Sharia and Law | | Foundation Studies | | Human Sciences | | Education | | Languages | | Arabic Language | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Year | M | F | M | F | M | F | M | F | M | F | M | F | M | F |
| 2016 | | | 32 | 31 | 41 | 30 | 35 | 2 | 73 | 180 | 45 | 181 | 7 | 18 |
| 2017 | 21 | 25 | 55 | 40 | 40 | 40 | 61 | 78 | 71 | 214 | 89 | 464 | 4 | 13 |

(Source: current study, 2018)

Institute B is a private higher education provider. The table shows that except for the field of Accounting, Tourism and Information Technology (IT), all other fields of study were dominated by females between the years 2016 and 2018.

**Table 4: Male and female enrolment by field of study in the Institute B**

| | Accounting | | Business | | HR | | Marketing | | Tourism | | IT | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Year | M | F | M | F | M | F | M | F | M | F | M | F |
| 2016 | 24 | 21 | 43 | 55 | 6 | 9 | 6 | 8 | 10 | 8 | 8 | 11 |
| 2017 | 24 | 29 | 57 | 89 | 7 | 14 | 5 | 7 | 1 | 0 | 12 | 5 |
| 2018 | 5 | 0 | 30 | 37 | 1 | 2 | 0 | 0 | 0 | 0 | 6 | 6 |
| Total | 53 | 50 | 130 | 181 | 14 | 25 | 11 | 15 | 11 | 8 | 26 | 22 |

(Source: current study, 2018)

Institute C is also a private higher education provider. Table 5 shows that female enrolment was higher than male enrolment in all fields of study, except in the field of Business Studies (Business) and IT. Female enrolment in the Education sector was significantly higher, representing 66% between the years while male enrolment in the field of IT was higher at 56%.

**Table 5: Men and women enrolment in the Institute C**

| | **Foundation** | | **Education** | | **Business** | | **Law** | | **Tourism** | | **IT** | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Year | M | F | M | F | M | F | M | F | M | F | M | Fe |
| 2012 | 0 | 1 | 2 | 17 | | | | | | | | |
| 2013 | 4 | 8 | | 13 | 1 | 2 | 6 | 2 | | | | |
| 2014 | 6 | 43 | 227 | 52 | 137 | 120 | 4 | 32 | 15 | 41 | 86 | 62 |
| 2015 | 14 | 33 | 100 | 364 | 147 | 133 | 0 | 0 | 14 | 2 | 26 | 20 |
| 2016 | 13 | 38 | 40 | 190 | 131 | 133 | 0 | 1 | 6 | 3 | 25 | 15 |
| 2017 | 6 | 10 | 41 | 173 | 91 | 99 | 0 | 0 | 2 | 2 | 23 | 21 |
| Total | 43 | 133 | 410 | 809 | 507 | 487 | 10 | 35 | 37 | 48 | 160 | 118 |

(Source: current study, 2018)

Table 6 summarizes the percentage of questionnaire respondents by sex. It is observed that out of 288 respondents who filled the survey form from the higher education institutes, 103 are males and 185 are females. This reflects that 64% of females are enrolled in higher education, while there is only 36% of males enrolled.

**Table 6: Representation in higher education by gender**

| **Sex** | **Representation in higher education** | **Percentage of representation** |
|---|---|---|
| Male | 103 | 36 |
| Female | 185 | 64 |
| Total | 288 | 100 |

Table 7 statistics show current enrolments in higher education by the field of study choice. The statistics show that the majority of students are enrolled in Education and Business Studies. Engineering, Marketing, Journalism, Building Construction, and Navigation have predominantly male enrolments, while Health, Psychology, General Foundation, Office Management, Science, Beauty and Therapy, and Economics have more female enrolments. The biggest difference between percentages are among the English Language, Human Resource Management, and Education subjects. Male-dominated IT and Law. The least difference was observed in the field of Quranic Studies, Tourism and Hospitality, Accounting and Finance, and Business Studies. This correlated with the statistics provided by the Department of Higher Education and the respective higher education providers. This trend also linked with the representation in sectoral employment by sex.

**Table 7: Field of study by sex**

| Field of study | No. of males (M) | % | No of females (F) | % | % difference between F & M cohorts | Total | Total % |
|---|---|---|---|---|---|---|---|
| Health | 0 | 0 | 7 | 100 | 100 | 7 | 100 |
| Psychology | 0 | 0 | 2 | 100 | 100 | 2 | 100 |
| General Foundation | 0 | 0 | 2 | 100 | 100 | 2 | 100 |
| Office Management | 0 | 0 | 2 | 100 | 100 | 2 | 100 |
| Science | 0 | 0 | 1 | 100 | 100 | 1 | 100 |
| Beauty and Therapy | 0 | 0 | 1 | 100 | 100 | 1 | 100 |
| Economics | 0 | 0 | 1 | 100 | 100 | 1 | 100 |
| Education | 16 | 18 | 71 | 82 | 63 | 87 | 100 |
| Human Resource Management | 5 | 28 | 13 | 72 | 44 | 18 | 100 |
| English Language | 1 | 33 | 2 | 67 | 33 | 3 | 100 |
| Business Studies | 28 | 44 | 36 | 56 | 13 | 64 | 100 |
| Accounting and Finance | 6 | 50 | 6 | 50 | 0 | 12 | 100 |
| Tourism and Hospitality | 1 | 50 | 1 | 50 | 0 | 2 | 100 |
| Quranic Studies | 2 | 50 | 2 | 50 | 0 | 4 | 100 |
| Information Technology | 15 | 65 | 8 | 35 | -30 | 23 | 100 |
| Law | 15 | 65 | 8 | 35 | -30 | 23 | 100 |
| Engineering | 2 | 100 | 0 | 0 | -100 | 2 | 100 |
| Marketing | 1 | 100 | 0 | 0 | -100 | 1 | 100 |
| Journalism | 1 | 100 | 0 | 0 | -100 | 1 | 100 |
| Building Construction | 1 | 100 | 0 | 0 | -100 | 1 | 100 |
| Navigation | 1 | 100 | 0 | 0 | -100 | 1 | 100 |
| Non-Responded | 8 | 27 | 22 | 73 | | 30 | 100 |
| Total | 103 | 36 | 185 | 64 | | 288 | 100 |

The country gender assessment by FAO (2019) stated that, although the country had made significant progress in advancing gender equality in education, it has not translated into decent labour opportunities. The report explained further that mining, construction, accommodation, food service, agriculture, forestry, fishing, and transportation activities were strongly dominated by men (Accounting for over 80% of the total employed population in these sectors). Women's employment mainly focused on social sectors such as education and health, as well as manufacturing and unidentified service-producing activities, (such as cooking teaching, caring for family members and other services that are produced by the household for its own subsistence) within the household.

The FAO (2019) report also showed that over 60% of civil servants were females, of whom 32% worked in administrative fields, 26% were teachers, 13% were in cleaning and maintenance sector, 11% were nurses, and 3% were in Accounting and budget fields. In addition, only 10% of police personnel were women, 30% were registered lawyers, 4% were judges and 66% were trained teachers. The Youth Vulnerability Assessment (NCTC, 2019) found that career guidance in schools and elsewhere was almost entirely lacking as was technical and vocational training, and girls were encouraged into teaching and nursing, while boys were put into fishing and tourism.

A potential limitiation in the scope of this study is that it does not include the caste system as a background variable. However, other studies have given some support that there are caste-like status groups in the country which are very much associated with the occupations that they represent. This is a subject worthy of future investigation. In the past, castes were more rigid than they are today, and even at present, there are occupations and job-related statuses which play a significant role in determining the privileges that one gets in the society.

Changes in the economic situation of the country have somewhat improved female representation in other areas, such as Accounting and Finance, Tourism and Hospitality, which had been predominantly male-dominated. With the change in socio-cultural and socioeconomic aspects in the society, the expectations associated with the gender roles and field of study are also evolving.

It should be noted that many socio-cultural beliefs are deeply rooted in society, and change take places slowly; usually changes associated with beliefs and their resultant attitudes are the slowest to change. This is most evident in sectors such as Tourism and Hospitality. Even at present, and to a greater extent in the past, female participation in the tourism sector was limited due to cultural and religious enforced restrictions on women's roles and mobility, along with the lack of structures and services for requirements such as childcare (FAO, 2019). Therefore, attraction to study in the field was also minimal. However, with the addition of a few female role models and some changes in ideology, female participation is increasing, and so is their representation in higher education in this field. However, there has been little improvement in STEM subjects. Furthermore, male participation in subjects such as Health and Education, which are predominantly female-dominated, are more limited.

Analysis of the reasons survey respondents provided for choosing particular field of studies, indicates six major criteria: (1) interest in the study program; (2) field-specific reasons such as perceived ability and benefits in the field; (3) recommendation from family to study the program; (4) perceived easiness of the study program; (5) availability of the study program; and (6) affordability of the study program. There was a gender difference in the choice of subjects studied by males and females, based on the occupations available in the country. Due to the changing economy, the country has progressed from a predominantly primary sector-based economy to a tertiary sector-based economy. Table 8 categorises 288 survey respondents by their reason for choosing the field of study by gender.

Table 8 shows that the determining factors for males were field-specific reasons and interest, while the determining factors for females they were availability and recommendation from family. Interest and field of work were secondary factors for

females. Affordability and perceived easiness as a determining factor were of equal importance for men and women.

**Table 8: Reason for choosing the field of study by sex**

| Reason for choosing the field of study | No of males | % | No of females | % | % difference between F & M cohorts | Total | Total % |
|---|---|---|---|---|---|---|---|
| Interest in the study program | 46 | 37 | 77 | 63 | 26 | 123 | 100 |
| Field-specific reasons | 22 | 38 | 36 | 62 | 24 | 58 | 100 |
| Recommendation from family to study the program | 4 | 21 | 15 | 79 | 58 | 19 | 100 |
| Perceived easiness of the study program | 5 | 50 | 5 | 50 | 0 | 10 | 100 |
| Availability of the study program | 0 | 0 | 25 | 100 | 100 | 25 | 100 |
| Affordability of the study program | 12 | 50 | 12 | 50 | 0 | 24 | 100 |
| Non-Responded | 18 | 55 | 15 | 45 | | 33 | 100 |
| Total | 103 | 36 | 185 | 64 | | 288 | 100 |

More males, therefore, have primary reasons as determining factors. Males tend to be more mobile than females, which is an important consideration given the geographical dispersion of the country and limited education and employment opportunities in the localities. In a survey conducted by UNDP (2014), 56% of women stated that limited employment opportunities are a concern for them at the community level. The same study also revealed that limited vocational and technical training and opportunities for education are concerns for women, both at the individual and community. When these external factors are not a determinant, males tended to get the advantage of choosing a subject of their interest. Furthermore, field-specific reasons, such as perceived ability and benefits, were also an advantage to males as a determining factor. Due to their cultural and social beliefs, women usually tended to stay in the family home prior to marriage. Therefore, women could only seek opportunities which were readily available to them within their communities.

The Youth Vulnerability Assessment (NCTC, 2019) stated that "students in Malé have a range of options and access to higher education, but those living on outer islands often have poorly equipped schools, and to study higher, they must move to the capital or to a larger island". In a study conducted by the World Bank (2016), both men and women reported a lack of opportunities on their resident island as their main reason for being unemployed. However, women—but not men—also cited the need to focus on childcare and household responsibilities as a reason for being unemployed, attesting to the

societal expectations that they have to face through their reproductive years. Furthermore, the statistics also showed that women own fewer cars and motorbikes than men; 1,068 vehicles registered to females while 6,020 vehicles registered to males in 2017 (FAO, 2019), indicating that accessibility to employment locations is a determining factor for females. The consequence of lack of mobility for females is also reflected in their participation in higher studies. In addition, because of such an overarching influence of the family, acting according to the recommendations of the family was inevitable. Therefore, recommendations from family was one of the key determinants for females when selecting their field of study.

For the two sexes, affordability and perceived easiness of the subject matter played a fairly major role as a determining factor. As in the context of Maldives, household decision making appears to be relatively gender-egalitarian. A nationally representative sample of married women surveyed in Maldives' 2009 Demographic and Health Survey (DHS) found that husband and wife make most household decisions jointly (World Bank, 2016). This could be one of the reasons why affordability was an equal determinant for both.

**Table 9: Factors which influenced the decision to study a particular field**

| Factors which influenced the decision | No. of males | % | No. of females | % | % difference between F & M cohorts | Total | Total % |
|---|---|---|---|---|---|---|---|
| No demands | 33 | 52 | 59 | 64 | 12 | 92 | 100 |
| Demands from work | 31 | 57 | 23 | 43 | -15 | 54 | 100 |
| Demands from family | 8 | 22 | 28 | 78 | 56 | 36 | 100 |
| Demands from spouse | 7 | 24 | 22 | 76 | 52 | 29 | 100 |
| Demands from community | 10 | 50 | 10 | 50 | 0 | 20 | 100 |
| Demands to balance work-life | 0 | 0 | 3 | 100 | 100 | 3 | 100 |
| Not-responded | 14 | 26 | 40 | 74 | | 54 | 100 |
| Total | 31 | 36 | 75 | 64 | | 106 | 100 |

In contemporary societies, it is important to consider the factor of freedom in making decisions regardless of one's gender. Freedom to make a decision was considered to be a dominant factor related to subject choice and studies. When the respondents were questioned about the influence on making their decisions, 52% of males and 64% of females stated that they have no social influence over their decisions. The factors considered herein were (1) demands from work, (2) demands from family, (3) demands from the spouse, (4) demands from the community, (5) demands to balance work-life. When considering the relative difference of percentages between male and female cohorts, females were more influenced by the demands in balancing work-life, family and spouse. When considering the male cohort, they were influenced by the demands from work. Community as an influential factor had relatively the same impact on men and women.

It was noted that a higher proportion of women (10.5%) tended to marry at an early age (between 18–19 years) compared to men (1.6%) in the Maldives. The majority of men (64.8%) and women (80.2%) were married by the age of 29. Therefore, a high number of those representing in the age group of higher education were married among females, hence the demands from spouse were prominent in making the decision relevant to studies and subject choice in studying.

Due to lack of systematic childcare services throughout the Maldives, it was extremely difficult to focus on career development without traditional extended family support. The Youth Vulnerability Assessment (NCTC, 2019) showed that many youngsters were living with their extended family as there was no means to acquire other proper housing facilities. With no organised childcare facilities available to replace family support networks, it was a significant challenge across the country for women to simultaneously balance a successful job or career with family care responsibilities. Due to dependency on the family for various supports, females were also influenced by their families when making the decision of study subject.

Furthermore, very often, husbands were away working either in fisheries or the tourism sector, thus females were left with most of the caretaking responsibilities. According to data from the 2014 census, 13% of women and only 1% of men stated that they were unemployed because of household chores. This pattern illustrates how gender unequal beliefs and roles in the private sphere (the importance of household chores for women but not men, for example) can disadvantage women's participation in the public sphere for reasons that men do not have to address (World Bank, 2016). Women in higher positions are more susceptible to health risks due to the stress of the multiple burdens placed upon them as breadwinners and caretakers who are responsible for all domestic chores (FAO, 2019). A study by Women on Boards (2017) found that 46% of women left jobs to maintain work-life balance.

In summary, our study showed that managing work-life balance was one of the factors influencing choice of study by females, whereas subject choices for males were influenced by demands from work. Demands from community such as expectation to fulfil a gender-stereotyped role and peer pressure were common to both genders.

## CONCLUSION

The study showed that factors other than the field of study impact students' choice of subjects in higher education. Furthermore, the study showed that several factors influenced males and females subject choices. Among the subject areas investigated, it was noted that females were most highly represented in English Language, Human Resource Management, and Education, while males were most highly represented in IT and Law. There was equal representation the fields of Quranic Studies, Tourism and Hospitality, Accounting and Finance, and Business Studies.

The study also showed that gender stereotyping starts at a younger age. Therefore, it is important to present a more gender-balanced and gender-inclusive content in the national curriculum and study materials from lower grades of study. Furthermore, the study also determined that students' choice of subject was very much dependent on the roles and occupations each gender saw for themselves in society. Choice of fields of study is further exacerbated by the hidden curriculum. To encourage females and males

to pursue various roles in society, it is important to incorporate gender sensitivity into teacher training. On this note, it is also crucial that gender aspects be incorporated into professional development programs, both at lower levels of schooling and higher education.

Overall, the determining factors for choice of fields of study for males were field-specific reasons and interests but for females the factors were availability and recommendation from family. Affordability and perceived easiness as a determining factor were of equal importance for both genders.

It is important to understand the context in terms of capability approach and process and not through equality in numbers. Agency plays a key role here. The condition or environment in which individuals are free to make up their mind without fear, violence, and shame are important. The study concluded that various contexts affect choices of study. Females were more influenced by the difficulties of balancing work-life demands from family and their spouses. When considering the male cohort, they were influenced by demands from work.

Community as an influential factor had relatively the same impact on both sexes. The study found that there were no systematic career guidance and scaffolding programs for students. Therefore, the exposure to a variety of fields and availability of information was limited. Furthermore, due to the geographic nature of the country, it is important to decentralise education, to maximize the opportunities available for all. At the macro level, the system should try to provide support, such as childcare and welfare, so that the individuals are encouraged to make decisions which are minimized by outside factors.

## REFERENCES

Achiam, M., & Holmegaard, H. T. (2000). *Criteria for gender inclusion.* University of Copenhagen.

Agbley, G. K. (2015). “My brother says girls don’t do Mathematics”: Girls’ educational experience and secondary school programme choices in Ghana. *UDS International Journal of Development*, 206–221.

Aigbomian, D. (2002). Science for all: Implications for the teacher and national development. *14th Inaugural Lectures of the Ambrose Alli University.* Nigeria: Ambik Press.

Alwedinani, J. A. (2016). *Gender and subject choice in higher education in Saudi Arabia.* University of York.

Apple, M. W., & Jungck, S. (1990). “You don’t gave to be a teacher to teach this unit”: Teaching, Technology and Gender in the Classroom. *American Educational Research Journal*, 232.

Atweh, B., Taylor, S., & Singh, P. (2005). School curriculum as cultural commodity in the construction of young people’s post-school aspirations. *Proceedings Australian Association for Research in Education.* Parramatta: University of Western Sydney.

Barone, Carlo. (2011). Somethings never change: Gender seggregation in higher education accross eight nations and three decades. *Sociology of Education*, 157–176.

Breda, T., Grenet, J., Monnet, M., & Effenterre, C. V. (2020). *Do female role models reduce the gender gap in science? Evidence from french high school.* https://halshs.archives-ouvertes.fr/halshs-01713068v3

Bronfenbrenner, U. (1977). Toward an experimental ecology of human development. *American Psychologist*, 513–531.

Buser, T., & Nierderle, M. (2012). *Gender, competitiveness and career choice.* University of Amsterdam.

*Cambridge Assessment*. (2020, May 19). *Cambridge Assessment*. AS and A Level Choice: Gender makes a difference. https://www.cambridgeassessment.org.uk/Images/109956-as-and-a-level-choice-factsheet-2.pdf

Card, D., & Payne, A. A. (2017, September). *High school choices and the gender gap in STEM* [NBER Working Paper No 23769]. National Bureau of Economic Research, Inc

Chan, A. K., & Cheung, A. K. (2018). *Gender differences in choosing STEM subjects at secondary school and university in Hong Kong.* The Education University of Hong Kong.

Chanana, K. (2001). *Interrograting women's education: Bounded visions, expanding horizons.* Rawat Publications.

Cheung, S. Y., Sullivan, A., & Werfhost, V. H. (2003). Social class, ability and choice of subject in secondary and tertiary education in Britain. *British Educational Research Journal*, 41–62.

Dom, V., & Yi, G. (2018). Gender and subject choice: An empirical study on undergraduate students' major in Phnom Penh. *Asian Journal of Social Science and Humanities*, 40–47.

Eccles, J. S., & Harold, R. D. (1991). Gender differences in sport involvement: Applying the Eccles' Expectancy Value Model. *Journal of Applied Sport Psychology*, 7–35.

Egozi, L. G., Shavit, Y., & Yaish, M. (2014). Gender differences in fields of study: The role of significant others and rational choice motivations. *European Sociology Review Advance Access*, 1–14.

Elder, G. H. (1978). Family history and the life course. *Transitions*, 17–64.

FAO. (2019). *Country gender assessment of agriculture and the rural sector in Maldives.* Malé.

Favara, M. (2012, November). *The cost of acting "girly": Gender stereotypes and educational choices.* Bonn: University of Essex.

Fullarton, S., & Ainley, J. (2000). *Subject choice by students in year 12 in Australian schools.* Victoria: LSAY Research Report.

Gerber, T., & Cheung, S.Y. (2008) Horizontal stratification in postsecondary education: forms, explanations and implications. *Annual Review of Sociology*, 299-318.

Gautam, M. (2015). Gender, subject choice and higher education in India: Exploring "choices" and "constraints" of women students. *Contemporary Education Dialogue*, *12*(1), 31–58.

Gorgadze, N. (2015). Gender aspect in primary education of Georgia. *International Journal of Education and Research*.

Grow, A., & Bavel, J. V. (2015). Assortive mating and the reversal of gender inequality in education in Europe: An Agent Based Model. *PLOS one, 10*(6).

Institute of Physics. (2012). *Its different for Girls: The influence of schools.* IOP. http://bit.ly/PUmAET

Ismail, L. (2015). Gender gap in higher education: Perspective on factors influencing enrollment in Malaysian universities: A University of Malaya sample. *The Online Journal of Quality in Higher Education*, *2*(4), 35–45.

Jacobs, J. A. (1996). Gender inequality and higher education. *Annual Review of Sociology*, *22*(1), 153–185.

Jacobs, J. E., & Simpkins, S. (2005). Mapping leaks in the math, science, and technology pipeline. *New Directions for Child and Adolescent Development*, 110, 3–5.

Jaspers, E., Maas, I., Lippe, T. van, & Vleuten, M. van (2016). Boys' and girls' educational choices in secondary education. The role of gender ideology. *Educational Studies*, *42*(2), 181–200.

Javed, M. (2018). Investigating factors affecting students' subject selection at secondary school level. *International Journal of Information and Education Technology*, *18*(11), 815–820.

Kane, E. (1996). *Gender, culture and learning.* Washington DC: Education Development.

Mendick, H. (2013). Choosing subjects: Sociological approaches to young women's subject choices. In R. Brooks, M. McCormack & K. Bhopal, *Contemporary Debates in the Sociology of Education*, 202-217.

Ministry of Education. (2008). *Girls' education policy.* Rwanda: Ministry of Education.

Momsen, J. (1991). *Women and development in the Third World.* Routledge.

Murray, S. L., Meinholdt, C., & Bergmann, L. S. (1999). Addressing gender issues in the engineering classroom. *Feminist Teacher*, *12*(3), 169–183.

Mutekwe, E., & Modiba, M. (2012). Girls' career choice as a product of a gendered school curriculum: The Zimbabwean example. *South African Journal of Education*, *32*(3), 279–292.

National Bureau of Statistics. (2020, August 18). *statisticsmaldives.* http://statisticsmaldives.gov.mv/nbs/wp-content/uploads/2020/08/IYD-2020.pdf

NCTC. (2019). *Youth vulnerability in the Maldives.* Malé.

OECD. (2015). *Trends shaping education.* OECD.

Oriahi, C. L., Uhumuavbi, P. O., & Aguele, L. L. (2010). Choice of Science and Technology subjects among secondary school students. *Journal of Social Science*, *22*(3), 191-198.

Parr, S. F. (2003). The human development paradigm: Operationalizing Sen's ideas on capabilities. *Feminist Economies*, Vol 9, Issue 2-3, 301-317.

Pascoe, C. J. (2007). *Dude, you're a fag.* University of California Press.

Patrick, M. D. (2009). *Addressing the lack of male elementary school teachers: Factors that influence grade-level preference.* Liberty University.

Schoon, I. (2014). Explaining persisting gender inequalities in aspirations and attainment: An intergrative developmental approach. *International Journal of Gender, Science and Technology*, 151–165.

Stevenson, B., & Zlotnik, H. (2018). Representations of men and women in introductory economics textbook. *AEA Papers and Proceedings* (pp. 180–84). American Economic Association.

Subrahmanian, R. (2005). Gender equality in education: Definitions and measurements. *International Journal of Educational Development*, *25*(4), 395–407.

Tasner, V., & Rozman, S. (2015). The influence of changes in the field of education on the position of women in Slovenian society and politics. In M. Antić Gaber (Ed.), Gender Structuring of Contemporary Slovenia, 37-54, Frankfurt: Peter Lang.

Tonin, M., & Wahba, J. (2014). The sources of the gender gap in economics enrolment. *CESifo Economics Studies*, Vol 61, Issue 1, 72-94.

UN Women. (2020, May 20). *UN Women*. Retrieved from un.org: https://www.un.org/womenwatch/osagi/conceptsandefinitions.htm

UNDP. (2014). *Maldivian women's vision document.* Malé.

UNESCO. (2005). *Guidelines for inclusion: Ensuring access to education for all.* UNESCO.

United Nations. (1997). *The economic and social council report for 1997.* United Nations.

Valls, X. D., Puy, G. S., & Alier, M. T. (2018). *Influence on gender stereotypes on career choice.* Universitat Pompeu Fabra.

Wang, M. T., & Degol, J. (2013). Motivational pathways to STEM career choices: Using expectancy–value perspective to understand individual and gender differences in STEM fields. *Developmental Review*, *22*(4), 304–340.

WEF. (2017). *The global gender gap report.* World Economic Forum.

Wigfield, A., & Eccles, J. (1995). In the mind of the actor. The structure of adolescents' achivement task values and expectancy-related beliefs. *Personality and Social Psychology Bulletin*, *21*(3), 215–225.

Women on Boards. (2017). *Leadership role for women: A survey on gender diversity and empowerment in Maldives.* Malé.

World Bank. (2016). *Understanding gender in Maldives.* Malé.

Zafar, B. (2009). *College major choice and the gender gap.* Federal Reserve Bank of New York: Staff Report.

Zolitz, U., & Feld, J. (2017). *The effect of peer gender on major choice.* University of Zurich.

---