Globalisation, Comparative Education and Policy Research 29

Joseph Zajda
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Discourses of Globalisation, Multiculturalism and Cultural Identity

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Aims & Scope

The *Globalisation, Comparative Education and Policy Research* series (volumes **13-36**) aims to present a global overview of strategic comparative and international education policy statements on recent reforms and shifts in education globally, and offers new approaches to further exploration, development and improvement of comparative education and policy research globally. In general, the book Series seeks to address the nexus between comparative education, policy, reforms and forces of globalisation.

The Series will present up-to date scholarly research on global trends in comparative education and policy research. The idea is to advance research and scholarship by providing an easily accessible, practical yet scholarly source of information for researchers, policy-makers, college academics, and practitioners in the field. Different volumes will provide substantive contributions to knowledge and understanding of comparative education and policy research globally. This new book series will offer major disciplinary perspectives from all world regions.

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Discourses of Globalisation, Multiculturalism and Cultural Identity

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To Rea, Nikolai, Belinda, Sophie, Imogen,
Paulina, Jan, Dorothy and Jim

Foreword

A major aim of *Discourses of Globalisation, Multiculturalism and Cultural Identity*, which is the 29th volume in the 36-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda and his team, is to present a global overview of selected scholarly research on global and comparative trends in dominant discourses of globalisation and cultural identity in comparative education research.

One of the most powerful forces of globalisation shaping cultural identities is the ubiquitous presence of information technology and the mass media. Every facet of culture and identity is defined and shaped by the mass media and propelled globally by the information technology. Global marketing of socially desirable commodities, such as clothing, fashion and global brands, perfumes, toys and the entertainment industry, to name a few, has constructed and shaped cultural identities. Global marketing affecting the formation of one's cultural identity has manufactured a new consumerist and a global materialistic culture of commodification of the self.

The book examines the ambivalent and problematic relationship between the state, globalisation and the construction of cultural identity. The book also demonstrates that language is intrinsically connected to personal, national and ethnic identity. Languages symbolise identities and are used to signal identities by those who speak them. People are also categorised by other people according to the language they speak, and the culture they share in terms of time, location and culture; the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation.

National identity, according to Smith (1991), represents a specific cultural community, whose members are united by common historical memories, values, beliefs, customs, conventions, habits, languages and practices, myths, symbols and traditions. It denotes such elements as 'historic territory, legal-political community, legal political equality of members, and common civic culture and ideology' (Smith, 1991, p. 11).

The book offers an easily accessible, practical yet scholarly source of information about the international concern in the field of globalisation, ideology, education and cultural identity. Above all, the book offers the latest findings on discourses surrounding ongoing cultural identity and social justice discourses. The book explores conceptual frameworks and methodological approaches applicable in the research covering globalisation, ideology and cultural identity discourses. More than ever before, there is a need to understand and analyse both the intended and the unintended effects of globalisation and forces of globalisation on nations, organisations, communities, educational institutions and individuals around the world.

This is particularly relevant to the evolving and constantly changing notions of nation-states, national identity and citizenship education globally. Current global and comparative research demonstrates a rapidly changing world where citizens are experiencing a growing sense of alienation, uncertainty and loss of moral purpose. The book contributes, in a very scholarly way, to a more holistic understanding of globalisation, ideology and cultural identities research. The book is both rigorous and scholarly and is likely to have profound and wide-ranging implications for the future of education policy, which focus on cultural identities and social justice reforms globally.

East Melbourne, VIC, Australia Joseph Zajda

Preface

Discourses of Globalisation, Multiculturalism and Cultural Identity, which is **volume 29** in the 36-volume book series Globalisation, Comparative Education and Policy Research, edited by Joseph Zajda, Nitza Davidovitch and Suzanne Majhanovich, presents a global overview of the nexus between globalisation and cultural identity globally. This book critiques dominant discourses and debates pertaining to cultural identity set against the current backdrop of growing social stratification, migration and border politics. It addresses current discourses concerning globalisation, ideologies and the state, as well as approaches to constructing national, ethnic and religious identities in the global culture. It explores the ambivalent and problematic connections between the state, globalisation and the construction of cultural identity. The book also explores conceptual frameworks and methodological approaches applicable to research on the state, globalisation and identity politics. Drawing on diverse paradigms, ranging from critical theory to discourse analysis, the book, by focusing on globalisation, ideology and cultural identity, critically examines recent research dealing with cultural diversity and its impact of identity politics. Given the need for a multiple perspective approach, the authors, who have diverse backgrounds and hail from different countries and regions, offer a wealth of insights, contributing to a more holistic understanding of the nexus between multiculturalism and national identity. With contributions from key scholars worldwide, the book should be required reading for a broad spectrum of users, including policymakers, academics, graduate students, education policy researchers, administrators and practitioners.

East Melbourne, VIC, Australia — Joseph Zajda

Editorial by Series Editor

Discourses of Globalisation, Multiculturalism and Cultural Identity, which is **volume 29** in the 36-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda and his team, presents a global overview of the nexus between globalisation, ideologies and cultural identities discourses, and implication for equity, democracy and human rights. Globalisation and the competitive market forces have generated a massive growth in the knowledge industries that are having profound effects on society and higher educational institutions. One of the effects of globalisation is that the education sector is compelled to embrace the corporate ethos of the efficiency, performance and profit-driven managerialism. As such, new entrepreneurial educational institutions in the global culture succumb to the economic gains offered by the neoliberal ideology, and governance defined fundamentally by economic factors.

The book explores the ambivalent and problematic relationship between the state, globalization, ideology and cultural identity discourses. Using a number of diverse paradigms, ranging from critical theory to globalisation, the authors, by focusing on globalisation, ideology, cultural identity and social justice reforms, attempt to examine critically recent trends in the political, social, economic and educational constructs affecting the evolution of cultural identities.

At the level of critical discourse analysis, we need to consider dominant ideologies defining the nature and the extent of political and economic power, domination, control, the existing social stratification and the unequal distribution of socially and economically valued commodities, both locally and globally. They all have profound influences on the directions of education, cultural identities and social justice research.

The book offers a synthesis of current research findings on globalisation and cultural identities, with reference to major paradigms and ideologies. The book analyses the shifts in methodological approaches to globalisation, cultural identities, social justice and human rights education reforms, paradigms and their impact on cultural identities discourses. The book critiques globalisation, policy and education reforms and suggests the emergence of new economic and political dimensions of

cultural imperialism affecting cultural identities globally. The book also evaluates discourses of globalisation, cultural imperialism, social justice, human rights education and neo-liberal ideology. It is suggested that there is an urgent need to continue to analyse critically the new challenges confronting the construct of identity in the global village. There is also a need to focus on the crucial issues at the centre of current and ongoing cultural identities discourses.

The authors focus on major and dominant discourses defining globalisation and cultural identities. These are among the most critical and significant dimensions defining and contextualising the processes surrounding the politics of cultural identities discourses globally. Furthermore, the perception of globalisation as dynamic and multifaceted processes clearly necessitates a multiple-perspectives approach in the study of cultural identities and their ongoing transformations. The book contributes in a very scholarly way, to a more holistic understanding of the nexus between globalisation, ideology and cultural identities discourses.

We thank the anonymous international reviewers, who have reviewed and assessed the proposal for the continuation of the series (volumes 25–36), and other anonymous reviewers, who reviewed the chapters in the final manuscript.

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Joseph Zajda, BA (Hons), MA, MEd, PhD, FACE, coordinates and lectures in graduate courses: MTeach courses: (EDFX522, EDSS503, EDES591 and EDFD546 in the Faculty of Education and Arts at the Australian Catholic University (Melbourne Campus). He specialises in globalisation and education policy reforms, social justice, history education, human rights education and values education. He has written and edited 51 books and over 150 book chapters and articles in the areas of globalisation and education policy, higher education, history textbooks and curriculum reforms. Recent publications include Zajda, J. (Ed). (2021) *3rd International Handbook of Globalisation, Education and Policy Research.* Dordrecht: Springer; Zajda, J. (Ed). (2020). *Globalisation, Ideology and Education Reforms: Emerging paradigms.* Dordrecht: Springer; Zajda, J. (Ed). (2020). *Human Rights Education Globally.* Dordrecht: Springer; Zajda, J (Ed.). (2020). *Globalisation, Ideology and Neo-Liberal Higher Education Reform.* Dordrecht: Springer; Zajda, J. & Rust, V. (2020). *Globalisation and Comparative Education*. Dordrecht: Springer; Zajda, J. & Majhanovich, S. (Eds.) (2020). *Globalisation, Cultural Identity and Nation-Building: The Changing Paradigms*. Dordrecht: Springer; Zajda, J. (2019) (Ed.). *Globalisation, Ideology and Politics of Education Reforms.* Dordrecht: Springer; Zajda, J. (2018). *Globalisation and Education Reforms: Paradigms and Ideologies.* Dordrecht: Springer; Zajda, J. (2017). *Globalisation and National Identity in History Textbooks: The Russian Federation*. Dordrecht: Springer; Zajda, Tsyrlina-Spady & Lovorn (2017) (Eds.).*Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks.* Dordrecht: Springer; Zajda & Ozdowski (2017). (Eds.), *Globalisation and Human Rights Education.* Dordrecht: Springer; Zajda & Rust (Eds.) (2016). *Globalisation and Higher Education Reforms.* Dordrecht: Springer; Editor and author of the *Second International Handbook on Globalisation, Education and Policy Research*. Springer, 2015. http://www.springer.com/education+%26+language/book/978-94-017-9492-3; Zajda, J. (2014). The Russian Revolution. In G. Ritzer & J. M. Ryan (Eds.), *The Wiley-Blackwell Encyclopedia of Globalization Online*; Zajda, J. (2014); Zajda, J. (2014). Ideology. In D. Phillips (Ed.), *Encyclopedia of Educational Theory*

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He is the editor of the **thirty-six volume** book series *Globalisation and Comparative Education* (Springer, 2013&2024).

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http://www.jamesnicholaspublishers.com.au/journals/ct/; Editor, *Curriculum and Teaching*, volume 36, 2022. http://www.jamesnicholaspublishers.com.au/journals/es/; Editor, *Education and Society*, volume 39, 2022. http://www.jamesnicholaspublishers.com.au/journals/wse/; Editor, *World Studies in Education,* volume 22, 2022.

His works are found in 612 publications in 4 languages and some 11,471 university library holdings globally.

He is the recipient of the 2012 Excellence in Research Award, the Faculty of Education, the Australian Catholic University. The award recognises the high quality of research activities and particularly celebrates sustained research that has had a substantive impact nationally and internationally. He was also a recipient of the Australian Awards for University Teaching in 2011 (Citation for Outstanding Contributions to Student Learning, for an innovative, influential and sustained contribution to teacher education through scholarship and publication). He received the Vice Chancellor's Excellence in Teaching Award at the Australian Catholic University (Melbourne Campus). He was awarded an ARC Discovery Grant (with Monash University) for 2011–2015 for a comparative analysis of history national curriculum implementation in Russia and Australia ($315,000). He was elected as Fellow of the Australian College of Educators (June 2013).

He has completed (with Professor Fred Dervin, University of Helsinki) the UNESCO report: *Governance in education: Diversity and effectiveness*. *BRICS countries*. Paris: UNESCO (2021).

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Chapter 1
Major Discourses of Cultural Identities

Joseph Zajda

Abstract The chapter critiques dominant discourses and debates pertaining to cultural identities in the global era. It analyses current discourses related to globalisation, ideologies, cultural identities, and the state, as well as approaches to constructing national, ethnic and local identities in the global culture. One of the most powerful forces of globalisation shaping cultural identities is the ubiquitous presence of information technology and the mass media. Every facet of our culture and identity is defined and shaped by the mass media, and propelled globally by the information technology. Global marketing of socially desirable commodities, such as clothing, fashion and global brands, perfumes, toys, and the entertainment industry, to name a few, has constructed and shaped cultural identity. Global marketing affecting the formation of one's cultural identity has manufactured a new consumerist and a global materialistic culture of commodification of the self. The chapter examines the ambivalent and problematic relationship between the state, globalisation and the construction of cultural identity. The chapter also demonstrates that language is intrinsically connected to personal, national, and ethnic identity. In terms of time, location and culture, the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation.

Keywords Alienation · Consumerism culture · Cultural identity · Discourses of cultural identity · Ethnic identity · Geographic identity · Globalisation · Global culture · Global identity · Identity crisis · Identity politics · Ideology · Institutional identity · Language · Local identity · Multiple identities · National identity · Nation-building process · Passport identity · Religious identity

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1.1 Discourses of Cultural Identities: Introduction

The usage of the term 'identity' can be traced to historical traditions in Western philosophy and intellectual thought, in particular to philosophers John Locke (1690) in his *An Essay Concerning Human Understanding* (1689) and David Hume (1739) in his Essays *on the Intellectual Powers of Man (1785). Locke (1690) wrote that identity consists of:*

> ... nothing but a participation of the same continued Life...consciousness always accompanies thinking. ...in this alone consists *personal Identity* (*Locke* 1690/2008).

Identity became a key word in the 1950s, when Carl Rogers (1902–1987), a noted humanistic psychologist, used the term to explain his idea of the self-concept. Rogers believed that one's identity, or the self-concept, consisted of the self-image, self-esteem, and the ideal self. The ideal self represented the person you wished to be. Eric Erickson (1902–1994), a prominent psychoanalyst, on the other hand, used the term to study adolescent personality/identity crises. Erikson, in *Childhood and Society* (1950), used a more holistic notion of 'national identities', which was his preferred term. Since then, there has been an incredible proliferation of the use of the term, across various disciplines and theoretical perspectives, referring to cultural identity, ethnic identity, racial identity, religious identity, sexual identity, gender identity, institutional identity, interest identity, tribal identity, passport identity, as part of the documentation identity, identity credit cards, and identity politics, to name a few.

In order to simplify the discourse of cultural identity, I propose to delineate between global and cultural perspectives of identity. A global perspective of identity was first used by Comenius (1592–1670), when he wrote that 'we are all citizens of one world':

> We are all citizens of one world; we are all of one blood. To hate a man because he was born in another country, because he speaks a different language, or because he takes a different view on this subject or that, is a great folly. Desist I implore you, for we are all equally human. . . Let us have but one end in view, the welfare of humanity (Comenius, n.d.).

A cultural perspective of identity refers to local identities, defined by a particular culture, language, religion, values, and location (Zajda, 2022a). Within many local communities there is a widespread consensus on what characterises their local identity (Terlouw, 2017). In addition, the construct of cultural identity is associated with a reification of culture, similar to Marx's notion of 'reification', which becomes a defining feature of the dominant discourse on identity (Bauman, 1996). Reification is the process of attributing concrete form to an abstract concept. Reification was used by Marx to describe a form of 'social consciousness in which human relations come to be identified with the physical properties of things, thereby acquiring an appearance of naturalness and inevitability' (Burris, 1988). Using the concept of reification, Marx tried to explain why workers accepted their labour and wages exploitation as natural.

The idea of national identity has always been one of the ontological and teleological goals of promoting nationalism, and a defining dimension of the nation-building process. National identity has certain core characteristics, which are emphasized at varying degrees from one nation to the next. As Smith (1991) explained, the six main attributes of ethnic community, as a foundation of national identity, are:

1. a collective proper name
2. a myth of common ancestry
3. shared historical memories
4. one or more differentiating elements of common culture
5. an association with a specific 'homeland'
6. a sense of solidarity for significant sectors of the population (Smith, 1991, p. 21).

Smith (1991) also reminded us that it was Friedrich Meinecke (1908) who was first to distinguish between the *Kulturnation*, the 'largely passive cultural community' and the *Staatsnation*, the 'active, self-determining political nation' (p. 8). 'National' identity refers to politico-economic and technological community. In a philosophical, legal and social theory sense, nation denotes a community of people obeying the same laws and institutions within a given territory' (Smith, 1991, p. 9). Hence, the defining elements of 'national' identity include one's homeland, and common values:

(a) territory, the homeland, or 'historic land'
(b) a community, or a patria, a community of laws and institutions with a single political will
(c) citizenship and associated sense of legal equality among the members
(d) common values, mass culture, civic ideology and traditions (including common historical memories, myths, symbols and traditions (Smith, 1991, pp. 9–11).

In short, the above elements denote a Western model of an 'ethnic' perception of the nation and national identity. Meselidis (2008) argued that Modern Greek identity was not 'purely a recent ideological construction or fiction of governments', since national independence (1821), in 'order to create and maintain the nation', but it was based on historical sentiment, myths, memories, values and traditions in Greek *ethnies* pre-dating the modern nation (Smith, 1998, pp.170–198). Thus, there exist strong cultural bonds and continuities between modern Greek national identities and the pre-modern (pre 1500 CE) cultural and historical Greek ethnic communities. This does not mean, however, that national identities do not change over the *longue duree*, as, indeed, Smith's working definition implies (Meselidis, 2008). There is strong evidence in the school textbooks (see Zajda, 2022a), to suggest that there is a continuous process of redefinition, revision, reinterpretation, and re-writing of historical narratives, in order to re-imagine national identity and nationalism.

Furthermore, identity is not that 'transparent or unproblematic', according to Hall (1996). Hall argued that identity is always positioned in the cultural context and, as such, is dynamic, as a continuous cultural process:

> Identity is not as transparent or unproblematic as we think. Perhaps instead of thinking of identity as an already accomplished fact, which the new cultural practices then represent, we should think, instead, of identity as a 'production', which is never complete, always in process, and always constituted within, not outside, representation. This view problematises

> the very authority and authenticity to which the term, 'cultural identity', lays claim (Hall, 1996).

It could be argued, that in terms of time, location and context, the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation. A more recent example of a geo-political transformation of cultural identities was the sudden collapse of the USSR in December 1991, and collapse of communist countries in Eastern Europe. Castells (2006) also points out that the nation-states have been weakened by various geo-political conflicts:

> The instrumental processes of power, global wealth, institutions, and the Nation-State no longer represent the nation and identities built on local autonomy. This lies at the root of the management crisis currently afflicting the world. Even the most powerful countries are affected by this crisis, of which the post 9/11 United States is an example. Under such circumstances, governments resort to the State's *raison d'être*, namely the ability to legitimise a monopoly of violence, as Weber put it. (Castells, 2006).

1.2 Identity Politics and Dominant Ideology

In addition to examining the processes affecting identity politics and nation-building, we need to consider the role of dominant ideology, or hegemony, defining such processes. In particular, we need to remind ourselves that globalisation is not apolitical phenomenon, and nation-building and citizenship education are hegemonic manifestations of re-invented nationalism and patriotism. By accepting globalisation and its economic and technocratic imperatives we are likely to sink into the ocean of conformity and impotent cynicism. Schmidt (2000) warns us against accepting the status quo, for the "The individual is obliterated not by confronting the system, but by conforming to it" (Schmidt, 2000, p. 252). Nation-building processes, currently taking place in many countries, including the USA, Japan, China and the Russian Federation, are re-invented narratives of traditional values and militant patriotism of the past. Samuel Johnson stated that "Patriotism is the last refuge of a scoundrel". Boswell tells us that Samuel Johnson (1775) made this famous pronouncement in 1775. James Boswell, a biographer of Samuel Johnson, assures us that Johnson was not indicting patriotism in general, only superficial patriotism (http://www.samueljohnson.com/refuge.html). As Bahruth (2005) observes, "Countless scoundrels would have us wrap ourselves in the flag, while the liberties it pretends to represent are shrinking under the pressure of the rhetorical patriotic act" (Bahruth, 2005, p. xi). Current debates in numerous countries around the world on citizenship education, nationalism and values education reflect neo-liberal ideology of uncritical conformity, order and obedience.

1.3 Cultural Identity in the Global Era: Language and Identity

1.3.1 The Role of Language in Defining and Shaping Cultural Identity

To begin with, languages symbolise identities and are used to signal identities by those who speak them. People are also categorised by other people according to the language they speak, and the culture they share. Byram (2013) argued that there is a very strong link 'between language and a sense of belonging to a national group'. One's language and culture affect resultant perception of national identity, and citizenship. A cultural perspective of identity refers to local identities, defined by a particular culture, language, religion, values and location (Zajda, 2022b). Within many local communities there is a widespread consensus on what characterises their local identity. Similarly, Sebba & Tate (2002) used the language as a medium of communication to explain how 'identities of British Caribbeans manifest and reproduce themselves through everyday discourse':

> ....identities are texts of social practice based on the identifications made in interactions between individuals (in this case, conversations). Looking both at the content of discourse (*what* is said) and the medium used (the *language* or language variety used in an utterance) we attempt to illustrate how global diasporic discourses of identity are reproduced at the local level. We argue that the 'global' and 'local' identities of British Caribbeans manifest and reproduce themselves through everyday discourse, and are constructed through identifications in which the choice of language and the choice of words interact and are both significant (Sebba & Tate, 2002).

Language is intrinsically connected to personal, national, and ethnic identity. The case of Canada provides a powerful example of the nexus between language and identity. Ever since the founding of Canada as a nation in 1867 and even prior to that in the Canada Act of 1791, English and French language rights have been acknowledged. It is fair to say that Canadian identity for its citizens involves being a member of a bi-lingual state. Although most Canadians are not in fact bilingual English and French speakers, nevertheless, Canadians accept a bilingual Canada as part of their national reality. A 2012 report from the Office of the Commissioner for Official Languages shows that 72% of Canadians favour bilingualism, and a 2016 Neilsen poll showed that 86% of Canadians believe that the Prime Minister should be bi-lingual. In the latter part of the twentieth Century Canadian governments spent a considerable amount of time grappling with issues of bilingualism and forging policies to address concerns (Zajda & Majhanovich, 2021).

The province of Quebec where the largest number of Francophones resides has been justifiably concerned about guaranteeing French language rights. Once about one third the population of Canada, francophones saw their numbers fall with declining birth rates and a rise in immigration to Canada. Those immigrants who settled in Quebec often favoured English over French as the official language to be learned, and also wanted to have their children educated in English rather than

French. The power of English in a globalized world posed a threat to the maintenance of a solid population of French speakers in Quebec and elsewhere in Canada. Speaking about the importance of language as part of one's place in the world, Thomas Ricento (2006) observed:

> Language is something most of us take for granted most of the time; it is usually when we discover that our language (or language variety) is different from and perhaps less valued than, the language of others, or that our options are somehow limited either because we don't speak/understand a language or language variety. . .that we begin to pay attention to languages (p. 21).

The choice of official language in several former USSR states signals how language relates to cultural identity. The Baltic States, Latvia, Lithuania and Estonia have all declared Latvian, Lithuanian and Estonian respectively as the official language of their post USSR nation eliminating Russian as a possible official language. In some cases, citizenship is contingent upon being fluent in the official language leaving Russian speakers who have resided in these states since before the dissolution of the USSR virtually stateless. This reflects the power of language in the construction of a national cultural identity. Belarus in contrast which identifies more with the Russian culture and traditions has designated both Belarussian and Russian as official languages (Zajda & Majhanovich, 2021).

The Balkan States provide another relevant example. When Yugoslavia existed as a federation of the states Slovenia, Croatia, Serbia, Bosnia-Herzegovina, Montenegro and Macedonia, the official languages were Serbo-Croatian, Slovenian and Macedonian and the languages appeared on the Yugoslavian banknotes in both Cyrillic and Roman alphabets. Once Yugoslavia dissolved, the new states declared their official languages as Slovenian, Croatian, Serbian, Bosnian, Macedonian, and even in some cases Montenegrin although the language is essentially Serbian and written in Cyrillic. Serbo-Croatian is no longer an accepted language even though except for the Cyrillic and Roman alphabets used (connected to the traditions of the Orthodox or Roman Catholic religions), they are almost identical languages. It is no longer permissible to recognize a language such as Serbo-Croatian related to what is now regarded as two separate cultures and ethnic identities. Bosnian, too has replaced Serbo-Croatian to reflect the Muslim culture in Bosnia Herzegovina. Under globalisation, even very small nations promote their ethnic identity through language while embracing the economic benefits that globalisation can provide. For example, Croatia is a member of the European Union but has chosen the Kuna as its currency, the Kuna being a traditional Croatian monetary unit dating to before the establishment of Yugoslavia (see Zajda & Majhanovich, 2021).

1.4 Global Cultural Identities

Since the 1980s, two parallel social, political, economic and technology-driven forces have impacted on the world. On one hand, the ubiquitous processes of globalisation affecting everything are occurring and, on the other, the transformation and reaffirmation of nation-building and cultural identities, both locally and globally, are taking place. Castells (2010) believed that globalisation, with its cultural homogenisation, was a potential threat to local cultures and to specific identities (see also Castells, 2006). This is due to globalisation perceived to be generating a global, cosmopolitan culture, and cultural homogenisation. At the same time, due to dominant political and religious ideologies, some nations wanted to preserve their historically-defined identities, based on language, nationality, ethnicity, religion, territory, and other relevant identity-defining characteristics. This has resulted in the local and global cultural identity dichotomy.

One of the most powerful forces of globalisation shaping cultural identities is the ubiquitous presence of information technology and the mass media. Every facet of culture and identity is defined by mass media, and propelled by information technology. Global marketing of socially desirable commodities, such as clothing, fashion and global brands, perfumes, toys, and the entertaining industry, to name a few, has affected cultural identity. Global marketing affecting the formation of one's cultural identity has manufactured a new consumerist and materialistic culture, of what Rea Zajda (1988) termed 'commodification of the self' (Zajda, 1988).

In one major comparative and cross-national investigation, Ariely (2012), testing the relationship between globalization and national identity, and using 149 national samples across 74 countries, wished to discover, whether country level of globalisation impacts on ethnic identity, and whether globalisation moderates between patriotism and ethnic identity. He concluded that globalisation does not reduce national identity, but it does reduce their sense of ethnic identity:

> While the impact of globalization does not erode people's national identification or their sense of nationalism' it seems that it does reduce their ethnic conceptions of membership in the nation (Ariely, 2012, p. 477).

In another study, Ariely (2019) also tested the nexus between country level of globalisation and its impact on ethnic identity and whether globalisation moderates between patriotism and ethnic identity. (Ariely, 2019). It was demonstrated that ethnic identity levels were lower in the more globalized than the less globalized countries:

> Although ethnic identity levels are lower in the more globalized than the less globalized countries, globalization has no differential effect on the strong and positive link between patriotism and ethnic identity (Ariely, 2019).

The complexity of globalisation, and its varied cultural, social and economic influences, together with the multidimensionality of national identity, is likely to produce 'the conflicting theoretical perspectives and inconsistency of the empirical findings' (Areily, 2019).

1.5 Multiple Identities

During the 1980s, post-structuralist scholars popularized the idea of multiple identities and multiple subjectivities in post-modern research. This represented was a radical paradigm shift from structuralism, which accepted the single core identity. Current research has stressed that the individual is not simply defined by one identity, internalised in one's culture and environment, but many other acquired identities. I want to argue, using sociological terminology of achieved and acquired status, that our identities, based on Bronfenbrenner's bio-ecological model, are both ascribed and constructed identities, and embedded in our cultures. Ascribed identities represent characteristics we are born with, or genetically defined features such as race, ethnicity and sex. Achieved identities refer to gender, occupation, values, professional mobility, power, class, status, and education. According to Scheuringer (2016) one's identity is 'constructed and formed through contact with other individuals, groups and cultures in one's socio-cultural environment' and that there are 'numerous identities in a society that are already fixed and established':

> The individual is confronted by those identities and must adapt to them. Individuals are seen as active participants in this process, capable of reflecting on it even constructing it and forming their own identity independently. A tension therefore exists between established social identities and the capacity of individuals to construct their own identities. This is a dynamic process that goes on throughout various life stages and differs according to social milieu. With this is mind; identity may be defined as one's personal awareness of being a distinctive individual, with a unique life-story and being in constant confrontation with the environment in order to attain a balance between individual claims and the expectations of this environment (Scheuringer (2016).

It could be argued that we all have multiple identities, based on race, gender, age, sexual orientation, occupation, and class. Sarah Gaither (2019) suggests that research needs to consider 'dual identities' that combine both traditional singular social categories, and other identities.

> Moreover, some past work with adults has shown that people do in fact claim distinct and overlapping identities at different times...A large amount of research also shows that bicultural individuals and others who have spent time studying abroad in other cultural contexts are more creative problem solvers because they have added experience reconciling their different cultural identities and social norms...(Gaither (2019).

Similarly, Kulich et al.(2017) confirms the existence of multiple social identities, which also differ how they were acquired:

> These multiple social identities differ considerably in the way they are acquired (e.g., inherited or achieved through accomplishments), in their relative stability or malleability, and in the value which they assign to the individual (e.g., low vs. high social status). (Kulich et al., 2017).

The authors discuss inherited identities, based on skin colour, sex, etc. and achieved identities, based on education, occupation, class and status:

> Although inherited and achieved social identities tend to correspond in their value and content over time...identities can differ in status and value, and create distressing experiences

> which call for a coping strategy in order to increase identity fit... When individuals face conflicting identities in terms of status or value, they use different coping strategies. Individuals may attempt to discard one of the identities, use in turn one or the other, or integrate or fuse both identities (Kulich et al., 2017).

The modern concept of multiple identities and multiple subjectivities, as discussed above, indicates that identities are much more complex and diverse, and are constructed and shaped by one's environment, the mass media, and forces of globalisation.

1.6 National Identity

National identity represents a specific cultural community, whose members are united by common historical memories, values, beliefs, customs, conventions, habits, languages and practices, myths, symbols and traditions. It denotes such elements as 'historic territory, legal-political community, legal political equality of members, and common civic culture and ideology' (Smith, 1991, p. 11). Smith (1991), argued that 'the underlying sentiments and aspirations that nationalist ideology, nationalist language and symbols evoke' relate to the three main concepts: territory, history and community (Smith, 1991, p. 78; see also Smith, 1995, 2002). Smith (2007) in his analysis of the impact of globalisation on cultural identity argued that global culture not only cannot replace national culture but that national identity possesses the capacity to withstand the forces of globalisation (Smith, 2007, p. 30). From Smith's (2007) analysis of cultural identity dynamics, according to Areily (2019), globalisation not only fails to create global identity but intensifies national feelings.

Smith, according to Guibernau (2004), has produced 'the most comprehensive analysis of the cultural components of national identity to date'. Guibernau (2004, p. 136). On the other hand, Guibernau (2004), responding critically to Smith (2002) argued that national identity is also a modern phenomenon of a 'fluid and dynamic nature':

> ...one by means of which a community sharing a particular set of characteristics is led to the subjective belief that its members are ancestrally related. Belief in a shared culture, history, traditions, symbols, kinship, language, religion, territory, founding moment, and destiny have been invoked, with varying intensity at different times and places, by peoples claiming to share a particular national identity. Generally, national identity is applied to citizens of a nation-state. There are other cases, however, where national identity is shared among individuals belonging to a nation without a state of their own... (Guibernau, 2004, p. 134).

National identity, according to Guibernau (2001) refers to 'the set of attributes and beliefs shared by those who belong to the same nation', and that 'the political aspect of national identity', when applied to the nation-state and nation-building, 'focuses upon those state's strategies, often referred to as 'nation-building', designed to cultivate a 'cohesive, loyal and up to a point, homogeneous citizenry' (Guibernau 2001, pp. 242–68). The state's strategies for building a single national identity, to

unite its citizens by shared core values, include, among others, the promotion of preferred image of the 'nation', communicating a desirable set of symbols and rituals to reinforce a sense of solidarity and community, and 'the advancement of citizenship involving a well-defined set of civil and legal rights, political rights and duties as well as socio-economic rights' (Guibernau, 2004, p. 140).

Exploring other types of identities, Zhuojun & Hualing (2014) suggested that national identity is a combination of institutional identity, interest identity, cultural identity and non-national community identity, and that national identity crisis lies in the ineffectiveness of nation states' governance. This is partly true. There are other mitigating factors relevant to national identity crisis, such as the nature of geo-politics, religious conflicts, and unstable capitalist economies legitimizing social inequality. The construction of national identity in the global age, requires a number of social, economic and political reforms, including reforming the political system, accelerating equitable economic transformation, grounded in equality and social justice, and promoting the idea of national culture, in order to 'strengthen value integration and enrich the cultural significance of national identity' (Zhuojun & Hualing, 2014).

However, globalization's effects on national identity are problematic and widely critiqued by numerous researchers. Some researchers argue that globalisation affects national identity in different ways:

> While some regard globalization as undermining national identity and increasing cosmopolitanism, others argue that it works in the opposite direction, possibly even reinforcing national feelings in the form of a backlash—or that it impacts different segments in society in dissimilar ways (Ariely, 2019).

The problematic nature of globalisation, and its varied cultural, social and economic influences, together with the multidimensionality of national identity are likely to produce 'the conflicting theoretical perspectives and inconsistency of the empirical findings' (Areily, 2019).

1.6.1 National Identity: Searching for Russia's Historical Cultural Identity

One somewhat complex example of an evolving cultural and national identity, is the current and on-going transformation of cultural identity in the Russian Federation (RF). In the RF, as a result of the nexus between nationalism, national identity, language and ideology, representation of heroes in history textbooks has ideological, cultural and pedagogical significance. Apart from preferred historical narratives and particular language used, illustrations and visual images are also used to reinforce the cult of a hero. National heroes tend to be celebrated for the important roles they played in history.

In their recent search for Russia's historical cultural identity, Russian policy makers and historians are compelled to cultivate a new sense of Russian identity

and consciousness. In doing so, they invariably use religion, in their attempt to re-discover the origin of the Orthodox faith in *Ancient Rus*, and its power to unite the people, when Prince Vladimir introduced Christianity in the kingdom of *Ancient Rus* in 988 AD (Zajda, 2017). The current cultural and ideological connections to religion, as a symbol of cultural identity in Russia, represent a new dimension of a return to traditional values. It could be argued that for Russia, in her search for identity in the twenty-first century, the road leads to 'inclusive and integrative' religion, which acts as a 'symbol of cultural identity':

> Only culturally inclusive and integrative type of religion will be religion as a symbol of a cultural identity (Kilp, 2011, p. 220).

1.6.2 Identity Crisis

With reference to cultural identities, and multiple identities in the global culture, it may be relevant to consider the role of alienation and identity crisis. The concept of identity crisis, which was influenced by the idea of alienation, was already discussed by Berman (1991), in his influential book *All that is solid melts into air*. Drawing on Marx's *Communist Manifesto* (1848), Berman (1991) examined the identity crisis confronting various nations during the later part of the nineteenth century:

> All that is solid melts into air all that is holy is profaned, and men at last are forced to face with sober senses the real conditions of their lives... (*Communist Manifesto*, 1848).

Alienation, in a modern sense, was first examined by Émile Durkheim (1893), a French sociologist in *The Division of Labour in Society* (translated by W.D. Halls. New York: The Free Press, 1984, and originally published in French in 1893). The crisis of materialism and the destruction of everything holy, resulting in the 'aura of holiness suddenly missing', meant that there existed an existentialist crisis and identity crisis. Berman (1991) explains it: 'We cannot understand ourselves in the present until we confront what is absent' (Berman, 1991, p. 89). It is not surprising, that Russia, in confronting what was absent, turned to religion, the Orthodox faith, nationalism and patriotism. Not only are its foot prints traced in the Ancient Russia, but its modernist revival is now celebrated across the nation.

1.7 Conclusion

The chapter critiques dominant discourses and debates pertaining to cultural identity in the global era. It analyses current discourses related to globalisation, ideologies, and cultural identity, as well as approaches to constructing national, ethnic and local identities in the global culture. One of the most powerful forces of globalisation shaping cultural identities is the ubiquitous presence of information technology and the mass media. Every facet of culture and identity is defined by the mass media, and

propelled by the information technology. Global marketing of socially desirable commodities, such as clothing, fashion and global brands, perfumes, toys, and the omnipotent entertainment industry, to name a few, has affected and transformed cultural identity. Global marketing, affecting and shaping the formation of one's cultural identity has manufactured a new consumerist and a global materialistic culture of 'commodification of the self'. As above demonstrates, the chapter examines the ambivalent and problematic relationship between the state, globalisation and the construction of cultural identity. The chapter also demonstrates that language is intrinsically connected to personal, national, and ethnic identity. It has been argued, as demonstrated above, that in terms of time, location and culture, the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation.

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Chapter 2
The Evolution of Canadian Identity as Reflected Through the Ontario Secondary School Curriculum

Suzanne Majhanovich

Abstract This chapter discusses how the Ontario school curriculum comes to grips with Canadian identity and how the concept has evolved over the years from one highly influenced by Canada's colonial ties to a cultural identity that draws on the contributions from its diverse population from the indigenous groups to settler groups from the two "founding nations" as well as those who have emigrated from all around the globe. The effects of globalization on Canadians' vision of themselves are also explored with relation to how school curriculum reflects Canada's position in the world and how its citizens should position themselves.

Keywords Canadian identity · Citizens · Cultural identity · French cultural elements · Globalization · Historical thinking · Identity · Immigrants · Neoliberalism · The Ontario school curriculum · National identity

2.1 Introduction and Context

Canada as a relatively young country made up of immigrants from all over the world along with the indigenous peoples from numerous tribes and groups, has found defining its identity rather problematic. It is not unusual for Canadians to self identify as Italian-Canadian, Scottish-Canadian, Ukrainian-Canadian, Chinese-Canadian or whatever heritage country they, their parents or forebears came from. Canadians often identify themselves in what they are not, as in how they differ from American or British people. This is perhaps not unexpected since it is only towards the end of the last century that Canada opted for its own distinctive flag without indications of its ties to Britain in 1965 (Vachon & Matheson, 2020), accepted as its national anthem, "O Canada" in 1967 (only officially adopted in 1980) (Canadian National Anthem, n.d.) rather than the former "God save the King/Queen". It finally brought its constitution home from the UK and enacted in 1982 its Charter of Rights and

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Freedoms. I recall as a child celebrating Empire Day on May 24th (now called Victoria Day), and being taught in school that England is our Mother country and our flag is the Union Jack. There was no consideration then in English-speaking Canada for the French heritage nor for those who came from around the world to make Canada their home, let along any recognition of the peoples who lived here before the European conquest. Canada's cultural identity has been impacted by its history as a British colony. Of course, in French speaking Canada, the concept of Canadian identity is tempered by a strong attachment to *la Francophonie* and what French cultural elements contribute to the notion of what it means to be Canadian in the geographical area of Quebec and other areas of Canada where French speakers predominate.

Today, what it means to identify as a Canadian has changed thanks to the government actively promoting a broader vision of Canada's make-up, as well as by changes in the Canadian curriculum to promote Canadian values and clarify the rights and responsibilities of being Canadian. However, Canadian cultural identity can be said to continue to be a work in progress.

The role of education as a socializing agent to teach the values embraced by the citizens of a nation has long been recognized. No less important is education's function in helping individuals develop their cultural identity. Clues to the desired cultural identity are evident in the curriculum adopted for instruction in secondary schools. In this paper, examples from the Ontario secondary school curriculum will be discussed in their role of defining Canadian cultural identity. Some examples from the Quebec secondary school curriculum will be included as well for purposes of comparison. First, however, I will turn to a discussion of the development of national identity.

2.2 The Formation of Cultural Identity

Zajda (In Zajda & Majhanovich, 2021) had defined national identity as representing "a specific cultural community, whose members are united by common historical memories, values, beliefs, customs, conventions, habits languages and practices, myths, symbols and traditions" (p. 6).

He goes on to refer to Guibernau's (2004) analysis of the cultural components of national identity. Guibernau in discussing how a national identity is formed, views the process as:

> . . .one by means of which a community sharing a particular set of characteristics is led to the subjective belief that its members are ancestrally related. Belief in a shared culture, history, traditions, symbols, kinship, language, religion, territory, founding moment, and destiny have been invoked, with varying intensity at different times and places, by peoples claiming to share a particular national identity. Generally, national identity is applied to citizens of a nation-state. There are other cases, however, where national identity is shared among individuals belonging to a nation without a state of their own. . . (Guibernau, 2004, p. 134, cited in Zajda & Majhanovich, 2021, p.7).

In a country like Canada with its so-called two founding nations France and Britain with two national languages, this causes some problems and has led no doubt to the somewhat bifurcated identity of Canadians with some identifying strongly with British cultural traditions and others with French ones, and Quebecers viewing themselves as Quebecers first in the nation of Quebec within Canada. The Federal Government of Canada has long been preoccupied with trying to develop an inclusive identity of Canadians. This has largely been attempted through a focus on the language issue. The *Official Languages Act* requires that the Minister of Canadian Heritage take measures to "encourage and support the learning of English and French in Canada" (Turcotte, 2019). It appears that the rate of bilingualism has been growing in Canada. Statistics Canada reports that in 2016 the bilingualism rate among youth outside Quebec had grown to 15% up from less than 13% in 2006 whereas in Quebec the bilingualism rate was up to 33% among youth compared to 28% in 2006 (Statcan, 2019). The government has an action plan for Official Languages 2018–2023 whereby they aim to enhance official languages in Canada over the next 20 years to increase the English-French bilingualism rate to 20% by 2036. This may be overly optimistic, but it is noteworthy that the numbers of Canadians favouring bilingualism for all of Canada has been holding steady and even growing. Statcan (2022) reports that 90% of 18 to 34 year-olds favour bilingualism for all of Canada compared with 84% of 35–54 year-olds and 79% of those 55 and older (Infographics: What Canadians think about bilingualism and the Official Languages Act, 2022). Of course, more Quebecers are in favour of bilingualism for all of Canada than Anglophones, but it is encouraging that the numbers that are pro-bilingualism among English speaking Canadians, especially among the youth is growing. As I have written previously, the case of Canadian identity provides a powerful example of the nexus between language and identity (Majhanovich, 2021 in Zajda & Majhanovich, 2021). Since Canada's founding as a nation in 1867 and even before that time English and French language rights have been acknowledged (see the Constitutional Act, 1791). Magnet (1998) noted that "Canada's Constitution was born in the attempt to unite two powerful language communities—two nations—in a single state" (p. 188). Bilingualism, French and English, has been a basic part of the Canadian identity. Although in fact, most Canadians, especially in the English dominated areas are not bilingual, Canadians still accept a bilingual Canada as part of their national reality. They also expect their Prime Minister to be bilingual and are in agreement that government services should be available to all citizens in both official languages. There is also strong support for members of parliament and supreme court justices to be bilingual. It is an interesting development on the linguistic development of Canadian identity that the current Governor General, Mary Simon, is a bilingual English Inuktitut speaker. She has however, expressed willingness to develop skills in the French language. To summarize then, national identity develops among members of a community who share a belief in such things as their traditions, language and founding moment. In the case of Canada with its multicultural make-up, cultural identity building has been complicated. The schools have been given the task of encouraging a desired Canadian identity through

the educational programs they offer. The concept of exactly what Canadian identity is, has evolved over the years.

2.3 The Ontario Curriculum for Secondary Schools

In Ontario currently, in order to earn a high school diploma, students have to earn 30 credits, of which 18 are compulsory and 12 are optional (Government of Ontario, 2020). Each full credit is considered to equate to a course of study with approximately 110 hours of instruction. Students accumulate credits over the four-year secondary school program. The 18 compulsory credits reflect the goal to provide students with a balanced education with courses from humanities, mathematics, sciences and technology, and social sciences. To illustrate the balance sought, required credits from the compulsory list include four credits in English (one per grade); three credits in mathematics, with at least one taken in grade 11 or 12; two credits in science; one credit in Canadian history and one in Canadian geography; one credit in the arts, one in health and physical education; and one in French as a second language. There are 2 half credits required in addition: one in career studies and the other in civics and citizenship. At first glance this would appear to favour, in addition to English studies, the STEM subjects. However, there are three groupings of subjects from which students must choose at least one credit from each; the first group contains mainly humanities and social science subjects, the second is largely devoted to physical education, the arts and business; and the third group contains extra science, computer studies and technological education courses. Courses such as cooperative education, international languages, business studies and technology are scattered throughout the 3 groups some appearing in more than one group. In this way students are allowed to pick up extra courses in, for example French as a second language which appears in all three groups, or in history. These credits form the 18 compulsory credits. The additional 12 credits are chosen from the three groupings of subjects in the overall list of possible credits but students may also petition to include as optional credits courses earned through approved dual credit programs, for example credits taken at a community college or university while in secondary school or advanced music performance courses taken through the Royal Conservatory of Music. As such, it is possible for students to graduate with a good selection of courses from the humanities, the social sciences and the STEM subjects. However, it would also be possible to heavily weight one's courses towards one area with a preponderance of science and technology courses and no foreign language or history courses beyond the initial required one credit. It is up to guidance teachers to encourage students to gain a balanced education. The choices available to students also depend on the way the timetable for courses is developed. It is not unusual for students to want to take additional French as a Second Language courses but be unable to fit them into their timetable because compulsory courses they need to register for are scheduled in the same time slot. However, it is theoretically possible

to graduate with four credits in French as a second language and three or four courses in history and social sciences.

2.4 The Role of the Curriculum in Developing Cultural Identity

The courses best suited to develop Canadian cultural identity would include those in English literature, French as a second language and history and social sciences. It should be noted however, that no subject is culture free. The examples used in science and mathematics texts relate strongly to the approved Canadian cultural identity. Similarly, topics excluded are significant for the hidden agenda conveyed. How many North American mathematics texts mention the role of the Arabic world in the development of algebra for example? For the purposes of this paper, however, I will draw on examples from courses in English, French, and History to illustrate how they contribute to forming a Canadian identity among Canada's youth.

2.4.1 English Language and Literature

The manner in which the content of these courses has changed over the years reflects the way the Canadian identity has evolved. When I was a secondary school student, English literature was almost exclusively devoted to literature from Britain or the US. Perhaps one novel and a few poems by Canadian authors might be included over the secondary school years. Every year included one Shakespeare play and favoured novels included British works like *Wuthering Heights* or a Dickens or Hardy novel; American favorite works included *To Kill a Mockingbird* or a Twain or Hemingway novel. Poetry also favoured works by "the Greats" like Tennyson, Wordsworth or Keats and American poets, Dickenson, Whitman or Frost. The only Canadian novel I recall studying was Hugh MacLennan's *Two Solitudes.* This classic work explores the divide between French and English communities in Canada through the context of relationships between characters from both sides and the prejudice each side bears against the other. Even at the University level in English studies the offerings of Canadian literature were restricted to one half course. Fortunately, that has changed and the rich heritage provided by Canadian poets authors and playwrights of all backgrounds such as Alice Munro, Margaret Atwood, Margaret Laurence, Yann Martel, Robertson Davies, Mordecai Richler, Michael Ondaatje, Indigenous writers Thompson Highway, Thomas King, and many others, is now a strong focus in both secondary and university courses.

2.4.2 *French as a Second Language*

One would think that in a country with two official languages, and that values bilingualism and sees it as part of the Canadian identity, that English speaking provinces would make French as a Second Language compulsory throughout the school system. Currently in Ontario, students begin studying French as a Second Language (Core program) in grade 4 and continue until Grade 8 with 40-minute per day classes. This provides only the minimal opportunity for proficiency leaving students with only a very basic knowledge of the language without much ability for true communication. Students are also required to take only one credit in FSL at the secondary level and so may graduate with practically no ability to use Canada's other official language. However, it is not quite so dire a situation for FSL in Ontario. FSL appears in all three groups of courses from which students must choose at least one credit. It is stated that "In groups 1, 2, and 3, a maximum of 2 credits in French as a second language can count as compulsory credits, one from group 1 and one from either group 2 or group 3 (Ontario High School Graduation requirements). That means that many students will automatically choose at least 3 FSL credits in the secondary program and can choose a fourth as an optional subject. Whether that will be possible will depend on the timetabling arrangement in the school which may or may not favour the choice of FSL beyond grade 9. A second factor in language learning is the large number of students who opt for French immersion from elementary school. Being in a French immersion program means that the medium of instruction for a majority of subjects will be in French. Students who opt for French immersion can attain quite high communicative fluency in the language. According to the Ontario statistics (Ontario Statistics 2021/22) for enrolment in FSL and French Immersion or its variant Extended French, in 2018–2019, 246,164 students were in French immersion programs, 33,110 were in Extended French programs (where at least half of the curriculum in provided in French) as opposed to 742,643 students in Core French (See also statcan.gc.ca). The numbers of students in French immersion have been growing every year and the demand for the program for students is very high among parents to the point that it is becoming difficult to find sufficient numbers of qualified teachers for the French immersion program. This strong support for programs in Canada's official language of French indicates that English speaking Ontarians do view bilingualism in English and French as a part of their Canadian identity. These statistics on language learning in Ontario are encouraging but when one compares the Ontario curriculum with its Quebec counterpart, one notes that in Quebec, English as a second language is a required subject from the first grade (Primary schools) through to the end of secondary schools up to college. (Government of Quebec Achievement Record, (n.d.)). As mentioned above, Quebecers are more favorably inclined to bilingualism than Anglophones and this is reflected in their school curriculum. As a minority group surrounded by a sea of English speakers, Quebecers realize the necessity of being able to communicate with the majority group, especially when it comes to employment in the global world.

As I mentioned above with regard to the English curriculum then and now and the choice of literature used, reflecting a Euro-centric lens, the same can be said for the Ontario French curriculum. In the past, most of the French literature studied both at the secondary and university levels involved the canon from France. There was a time when the university I attended offered only one half course to students majoring in French in French Canadian/Quebecois literature, and then this literature was considered somehow second rate. Now, whole programs, world-wide focus on the rich heritage of Quebecois literature.

2.4.3 History and Social Sciences

Canadian history in secondary education for most of the twentieth Century was considered rather boring and so, in addition to the grade 7 and 8 Canadian social studies courses was an upper level course that not all students opted to take at that time. Instead, the courses available to students in grades 10, 11 and 12 included American History, Ancient History and The Modern Age which was mainly focused on European History. I recall one popular text that we used, entitled *Breastplate and Buckskin* by George E. Tait (Tait, 1953) first published in 1953 with 31 total printings. This text told the swashbuckling tales of the early explorers, the fur traders and conquistadors in the new world. I personally enjoyed history from this text never once seeing the preference shown to the European invaders and settlers, nor considering the omitted stories of the original inhabitants of the new world nor the mistreatment they suffered under the colonizers. This text would never be acceptable today but certainly in its time helped to forge the identity of young Canadians as descendants of the European settlers without regard to the importance of other origins.

The ancient and early history course for grade 11 dealt mainly with Egypt and Athens with no mention of Asia or Africa (outside of Egypt). The text used, *The Rise of Western Civilization* (1967) by J. E. Cruikshank et al. (1967) reflects a conscious omission of civilization outside of the European and Mediterranean regions. The grade 12 text, *The Modern Age* by Richards & Cruikshank (1955) also focused on the expansion of Europe, colonialism, European wars and revolutions and the Development of the British Commonwealth. These texts were clearly based on a Euro-centric vision of the world.

The upper school, grade 13 text, *Canada and the United States. A modern story* 1967 by K. McNaught & Ramsay Cook (1967) was devoted to Canadian and American history with more emphasis on American stories. It is no wonder that until recently Canadians could more readily name American Presidents than Canadian Prime Ministers and sometimes even declared that an American President was the political leader in Canada. Some Canadians today may claim second Amendment rights (the right to bear arms), which is part of the American Constitution while in the Canadian Charter of Rights and Freedoms no such constitutional right to bear arms is included. Likewise, Canadians may try to plead the 5th (the American Amendment that allows witnesses to refuse to answer any question that might incriminate them)

whereas in Canada while everyone has the right to remain silent according to our Charter, if witnesses agree to testify in a trial they can be forced to answer incriminating questions. This shows that Canadians are by and large more familiar with the American constitution than with their own Charter of Rights and Freedoms.

The history curriculum of the past characterized by Euro-centrism and an unquestioned acceptance of the colonial supremacy in the country contributed to a confused sense of Canadian identity where many Canadians would be at a loss to explain what exactly a Canadian was except in terms of the Canadian relationship to Britain or France as well as how we differ from our American neighbours. I loved studying history as a secondary school subject even though success in history usually meant memorizing dates of various conquests or names of important men of history; learning history was mainly a task of "knowing the facts".

In recent times, the understanding of how we should view history has changed, the contexts for study have been expanded, and the pedagogy for the subject has greatly evolved. Rather than just learn facts, students are now expected to analyse the importance of historical issues; to determine factors that affected historical events; to explore ways in which the world has stayed the same and what has changed over time; and finally to examine and analyse past actions, developments and issues in the context for their timeframe. In other words, history students are expected to employ critical thinking when looking at historical events and issues. Canadian history teachers have been much informed by the work of UBC scholar Peter Seixas who has argued strongly that history must be approached from a critical standpoint. He states:

> Competent historical thinkers understand both the vast differences that separate us from our ancestors and the ties that bind us to them; they can analyze historical artifacts and documents, which can give them some of the best understandings of times gone by; then can assess the validity and relevance of historical accounts, when they are used to support entry into a war, voting for a candidate, or any of the myriad decisions knowledgeable citizens in a democracy must make. All this requires "knowing the facts", but "knowing the facts" is not enough. Historical thinking does not replace historical knowledge: the two are related and interdependent (Seixas, 2008, cited in The Ontario Curriculum Grade 9 and 10 *Canadian and World Studies: Geography, History, Civics (Politics)*, 2018, p. 11 (Government of Ontario, 2018)).

Peter Seixas and Tom Morton (2013) developed six key concepts of historical thinking that have influenced the way history courses are taught and texts are written for Ontario secondary school. The "Big Six" concepts include: 1. historical significance, 2. evidence, 3. continuity and change, 4. cause and consequence, 5. historical perspectives, and 6. the ethical dimension. In the Ontario Curriculum guides for Grades 9 and 10: *Canadian and World Studies: Geography, History, Civics (Politics)* (2018), and Grades 11 and 12 *Canadian and World Studies; Economics, Geography, History, Law and Politics* (Government of Ontario, 2015), the authors confirm that all history courses are underpinned by four concepts of historical thinking; namely, historical significance, cause and consequence, continuity and change and historical perspectives. By making these concepts the organizing principle of the history and world studies courses, the designers of the program hope to guide students to develop the ability to think critically about significant events,

developments and issues, both within the curriculum and in their lives outside the classroom (Ontario Curriculum Guide, 2015, p. 10). Each course is approached by identifying "big ideas" and then providing framing questions for teachers and students to address in their development of understanding of the historical accounts. It should be noted that the Quebec secondary school history curriculum is also informed by the work of Seixas and organized according to his concepts of historical thinking.

Canadian History was always compulsory for grades 7 and 8 as well as grade 10 but the past approaches to the Canadian story which seemed to accept unquestioned the supremacy of the colonial influences led to, as mentioned above, a confused identity formation that left many elements of Canada's makeup as exterior, unimportant factors. In addition, the focus on the sequence of events in the formation of Canada as a nation merely as facts to be memorized left most students unimpressed; in short, Canadian history was boring to them and they much preferred the more exciting stories from the US or about the European wars and revolutions.

The newer approach to the study of history framed under the concepts of historical thinking has the ability to engage students more fully and to lead them to a greater understanding of what it means to be Canadian in today's world. The courses available to students in history by and large look the same as in the past but the new way of addressing them has improved students' historical perceptions. Thus, we find courses like "Canadian History since World War I" as the compulsory grade 10 course, "World History to the End of the Fifteenth Century" as the grade 11 (optional) course, and "World History since the Fifteenth Century" as the grade 12 (optional) course. This reflects content matter that history teachers have always found important but by approaching the courses informed by Seixas' concepts of historical thinking, teachers can engage their students deeply in making sense of the past. Interesting and promising additions to the history curriculum are some new offerings which provide opportunities for students to investigate in depth elements of Canadian society not related to the colonial heritage. Such courses as "Origins and Citizenship: The History of a Canadian Ethnic Group" allow students to look into the stories of Canadians of other ethnic heritages rather than British or French while acknowledging the importance of Canada's multicultural composition. Given the diverse nature of Canadian schools, many students from ethnic backgrounds other than British or French would no doubt be interested in such a course. Canadian students from the traditional backgrounds can also explore through this course the contributions to Canadian society from one of Canada's many diverse groups. A grade 12 course, "Canada, History, Identity and Culture" speaks to the issue of identity making in the Canadian nation.

It should be noted that in Quebec where the secondary school history and social science curriculum resembles its Ontario counterpart, especially in the Seixian approach to studies (Gouvernement du Québec, 2017 Government of Quebec Achievement Record, n.d.), two compulsory credits in Ethics and Religious Culture are required to complete graduation requirements. This very much reflects Quebec's background strongly influenced by the Roman Catholic Church, even if now Quebec

has clearly divided Church and State in all aspects of society. The Religious background is very much a part of the Quebec identity and this is recognized in their school curriculum.

Canada is very much a part of the globalized world. One of the courses that deals with this issue is "World History since 1900: Global and Regional Interactions." I will discuss the influences of globalization and neoliberalism in the next section, but here I provide one example of how globalization is acknowledged in the history curriculum through this course. Canada's indigenous heritage has long been largely ignored. Certainly, in the past, in the school curriculum, the people of Canada's first nations were depicted as a kind of exotic "other" or worse as conquered peoples isolated to distant reserves as a result of the waves of colonialization from Europe and expanding settlement of the country. However, in the twenty-first century Canada is finally trying to address the wrongs committed over the centuries to its indigenous inhabitants. This is reflected in the Ontario curriculum where students can opt to pursue a course in First Nations, Métis and Inuit studies. Where numbers permit, courses in various native languages are even offered. In addition, teachers are counselled to treat content in courses dealing with indigenous peoples in a sensitive and balanced way. In some faculties of education, there are now required courses in indigenous studies to inform and prepare future teachers to present course matter pertaining to First Nations, Métis or Inuit peoples to include the standpoint of the indigenous groups.

2.5 Globalization and How It Is Reflected in the Ontario Secondary School Curriculum

The phenomenon of globalization has for some time now been a major factor in the way the world has developed. It has been an agent for a particular kind of *Weltanschauung*. As Zajda has argued:

> Globalisation as a phenomenon, is a multi-dimensional cultural construct, reflecting the necessary interdependence and connections of all core facets of culture: the economy, politics, ideology, languages, education, consumer goods, travel, modes of communication, technology, and the people around the world (cited in Zajda & Majhanovich, 2021, p. 2).

Since the end of the Cold War under globalization, there has been a convergence of Western values which has dominated the world, exemplified through movies, music and social media. Trade practices following the Western Neoliberal agenda have dominated. It has been assumed in the West that under globalization, the whole world would embrace such values as democracy, freedom, equality, personal dignity, individualism, and pluralism. (See David Brooks, 2022). However, such has not been the case because in an age of globalization the predominance of Western values, the power of the English language as the lingua franca, and the subserviency of nation states to powerful international commercial endeavours has threatened those outside the English-speaking centre, especially those who have not benefited from the economic practices of neoliberalism.

Traditional notions of identity have been challenged. Japanese scholar Yukio Tsuda (1997) speaking of the dominance of English in Japanese higher education, laments the colonization of the consciousness of and the identification with the English, its culture and people and calls for resistance in order to protect Japanese culture. Putin's call for super nationalism and patriotism in Russia can be seen as a reaction to the effects of globalization and an effort to protect traditional Russian culture and identity against encroaching Western values and practices, as can to a certain extent his invasion of Ukraine, a nation wishing to accept what globalization has to offer and embrace Western ways. Even within Western countries, various factions have begun to oppose the values of globalization in an effort to protect their individual values and identities. Brexiteers, xenophobic nationalists, Trumpian populists [and] the anti-globalist left (Brooks, 2022) are the most obvious examples of this resistance. As Ariely has observed:

> While some regard globalization as undermining national identity and increasing cosmopolitanism, others argue that it works in the opposite direction, possibly even reinforcing national feelings in the form of a backlash—or that it impacts different segments in society in dissimilar ways (Ariely, 2019).

However, the school system in Ontario continues to firmly support the phenomenon of globalization, or at the very least is committed to making Ontario students ready to be part of a globalized world. For example, in the preamble of the Curriculum Guideline for Canadian and World Studies, the authors state:

> The...curriculum recognizes that, today and in the future, students need to be critically literate in order to synthesize information, make informed decisions, communicate effectively, and thrive in an ever-changing global community (The Ontario Curriculum Grades 9 and 10. *Canadian and World Studies: Geography, History and Civics (Politics)* (2018) p. 3).

Examples of attention to neoliberal elements of globalization are found in the requirement for all students to prepare a "business plan" outlining the courses they intend to take in secondary school to ensure that they are developing the kind of skills that will enable them to work in a globalized world. Another example is the required half credit in career studies. The fact that Ontario still relies in part on standardized tests including successful completion of the Ontario Secondary School Literacy Test (OSSLT) as part of requirements for successful secondary school completion speaks to the influence of neoliberal globalization. Another example of neoliberal globalization influence can be found in the tendency of school guidance teachers to advise students to include as many STEM subjects as possible in their study program since these are seen as the kind of subjects that will lead to good jobs once they enter the world of work.

A rather instrumental approach to learning also reflects a commitment to, in particular, neoliberal globalization. The study of French as a Second Language, for example is now supposed to follow a methodology that will encourage students to learn French or other international languages so that they can put their knowledge to practical purposes in jobs in Canada and around the world.

The CEFR (Common European Framework of Reference) for Languages which is a "standard way of describing language proficiency whereby it is possible to compare language skills, tests and exams across languages and national boundaries" (www. French kwiziq.com. See also Little & Figueras, 2022; Council of Europe, 2001) is used throughout Europe for all European languages and has been accepted in Ontario as the approach to teaching French as a second language. It is a comprehensive method but rather instrumental as the guiding questions focus on what a student can do in a language, e.g., "I can order in a restaurant in French". Cultural understanding and aesthetic appreciation are played down. Students are told that if they can display competence in the language at an intermediate level (B1 or B2) their skills will be recognized by international companies worldwide and may help them to find a job. As such the incentive to study French in Ontario would not seem to lead to seeing French as part of one's Canadian identity, but rather as helping to develop an identity as a global citizen. To be fair, to encourage both elements, Canadian bilingual identity and being a member of the global world can co-exist as goals within the same curriculum.

As mentioned above, students learn about globalization and Canada's participation in it through the course "World History since 1900: Global and Regional Interactions". Other optional courses explore economic implications of Canada in a globalized world, such as "The Individual and the Economy" or Analysing Current Economic Issues". Or "Canadian and International Politics" where such international organizations as the World Trade Organization, the European Union, Asia-Pacific Economic Cooperation and the North American Free Trade Agreement are studied. One framing question for this course asks: "Has globalization harmed or benefited Canada? Would the answer be the same for all Canadians?" Students will reflect on how globalization affects Canada and its different regions. Issues related to globalization are threaded throughout the Ontario Secondary School curriculum and as such students will come to recognize themselves as part of a globalized world.

2.6 Conclusions

In this chapter, I have looked at how Canadian identity has evolved and developed as reflected in the school curriculum in Ontario, particularly that curriculum dealing with the subject disciplines English, French as a second language and History and Social Sciences. Background on the Canadian context over the past decades has been provided along with a general discussion on how cultural identity is formed. In discussing the Ontario school curriculum then and now, I compare how in the past the English, French and History curricula were developed in a context of a colonialized Canada attached to a Eurocentric world vision. At that time the notion of a uniquely Canadian cultural identity was problematic and uncertain. In contrast to that, in recent times the curricula of these subjects reflect efforts made to define Canada as a nation in the process of forging its unique identity separate from its colonial past but part of a globalized world, through the contributions of its diverse

population. The change in approach has partially come about through advances in pedagogical techniques intended to help students develop critical thinking skills that will aid them in constructing an informed view of the world and their place in it. Although most examples are drawn from the Ontario school curriculum documents, some evidence is provided by way of comparison from Quebec parallel documents.

In a final section the issue of globalization and the ways it has impacted the Ontario school curriculum is discussed. Despite recent hiccups in the world globalization project, the Ontario curriculum thus far seems to accept globalization as the norm and as such addresses the various issues around globalization in several areas of the curriculum both through the content and requirements for students to achieve their secondary school diploma.

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Chapter 3
The Globalization of Human Rights for a Global Citizenship: New Challenges

José Noronha Rodrigues

Abstract The global affirmation of human rights will only be viable with the public awareness necessary for their full implementation and the capability to overcome new challenges. In this context, it is necessary to bring together all international instruments, whether of a universal or a regional and/or national nature, to safeguard the most elementary human rights and to improve and remedy minor deficiencies or gaps in these legal instruments. Such instruments will facilitate the selection of true principles and universal human rights in a single universal instrument that is binding within states to create global citizenship.

Keywords Globalization · Global citizenship · Human rights · New challenges

3.1 The Globalization of Human Rights for a Global Citizenship

3.1.1 Introduction

It is not difficult to combine the concepts of globalization, human rights, and global citizenship within organizational operations. This is also because these concepts are easy to combine or correlate, since we are all implicitly aware that respect for human rights must be global, independent of citizenship and/or the State. On the other hand, we are also aware that new challenges, awareness, democratization and globalization of human rights are necessary for these concepts to be fully respected and universally applied within states. However, it is unknown whether there is a universal conception of human rights.

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We believe there is, because although each of these concepts individually has an autonomous juridical-conceptual meaning, they are in reality complementary when analyzed together. According to Oriani and Oriani,

> [globalization] operates as a process that spreads across the globe behaviours and attitudes that influence social, political, economic, and cultural aspects, among others. As far as human rights and citizenship are concerned, globalization has served as an element that accentuates the universality of the individual and the standardization of subjects (2008, p. 40).

Moreover, globalization presupposes the university and the standardization of norms, conducts, meanings, and applications, which implies the conception of rights as a mode of globalized localism, operating through the regulation of actions from top to bottom, i.e., that are hierarchized and imposed as a set of [. . .] arenas of cross-border struggles. (Oriani & Oriani, 2008, p. 41; Santos, 1997, p. 111). In other words,

> . . . human rights are central to today's democratic societies in terms of both the legitimacy of states and the ways of life of populations. The analysis of their institution's process helps to understand the extent to which it is applied in today's world. (Fernandes, 2009, p. 11).

Even though human rights are guaranteed in international instruments, they do not extend to the entire global population, but to citizens of countries with rights recognized by the 1948 Charter of the Rights of United Nations (UN) Organizations:[1]

> We the peoples of the United Nations, determine - to save succeeding generations from the scourge of war, which twice in our lifetime has brought untold sorrow to mankind, and - to reaffirm faith in fundamental human rights, in the dignity and worth of the human person, in the equal rights of men and women and of nations large and small, and - to establish conditions under which justice and respect for the obligations arising from treaties and other sources of international law can be maintained, and - to promote social progress and better standards of life in larger freedom, – For these ends - to practice tolerance and live together in peace with one another as good neighbours, and - to unite our strength to maintain international peace and security, and - to ensure, by the acceptance of principles and the institution of methods, that armed force shall not be used, save in the common interest, and - to employ international machinery for the promotion of the economic and social advancement of all peoples. [We] have resolved to combine our efforts to accomplish these aims. Accordingly, our respective Governments, through representatives assembled in the city of San Francisco, who have exhibited their full powers found to be in good and due form, have agreed to the present Charter of the United Nations and do hereby establish an international organization to be known as the United Nations (Charter of the United Nations, 1945, p. 1).

However, despite the universal conception of human rights, the global affirmation of human rights will only be feasible, in our opinion, with the public awareness that it needs for their full implementation/application of new challenges. In this context, it is necessary to group all international instruments, whether of a universal nature or of

[1] The United Nations Charter was signed in San Francisco on June 26, 1945, after the close of the United Nations Conference on International Organization, entering into force on October 24 of that same year.

a regional and/or national nature, to safeguard the most elementary human rights and to improve and remedy minor deficiencies or gaps in these legal instruments. In doing so, such efforts will identify the true principles and universal human rights in a single universal instrument binding in states to create global citizenship.

3.2 The Conceptual Interconnection Between Globalization and Human Rights: Emergence of a Universal Convention on Human Rights!

At present, much is said about the conceptual interconnection between globalization and human rights, specifically whether, with globalization, human rights are safeguarded and/or universally respected. However, this subject is rather controversial and varies from author to author, so we will limit ourselves at this point to listing the main characteristics of these two concepts and, at the same time, we will try to outline them.

Zygmunt Bauman (1999) refers to globalization as a 'process that affects us all':

> ... the order of the day; a fashionable word that quickly becomes a motto, a magic incantation, a password capable of opening the doors of all present and future mysteries. For some, globalization is the irremediable fate of the world, an irreversible process; it is also a process that affects us all in the same measure and in the same way. We are all being globalized – and that means basically the same for everyone (Bauman, 1999, p. 7).

With reference to globalization, Maria Dias Correia (2000) that it results in the 'integration of capital, technology and information':

> [globalization is] not just a phenomenon or a passing trend; it is the international system that replaced that of the Cold War. Globalization is the integration of capital, technology, and information beyond national borders, creating a single global market and, to some extent, a global village. We cannot understand the news, or know how to invest our money, or think in what direction the world is going, without understanding this new system that is influencing the domestic policies and international relations of virtually every country in the world today (Correia, 2000).

Along this wave of thought, Luis Campos and Sara Canavezes (2007) argues that that there existed a 'growing interconnection and interdependence between states, organizations, and individuals throughout theworld':

> [although] there are multiple approaches and definitions of globalization proposed by the bibliography, it is worth highlighting some common aspects: it is a worldwide process, that is, transversal to the set of nation states that make up the world; an essential dimension of globalization is the growing interconnection and interdependence between states, organizations, and individuals throughout the world, not only in the sphere of economic relations, but also at the level of social and political interaction. In other words, events, decisions, and activities in a given region of the world have meaning and consequences in very different regions of the globe. A characteristic of globalization is deterritorialization, i.e. relations between people and between institutions, whether of an economic, political, or cultural nature, tend to be detached from the contingencies of space. [T]echnological developments that facilitate communication between people and between institutions and that facilitate the

> movement of people, goods, and services constitute an important nerve center of globalization (Campos & Canavezes, 2007, p. 10).

The way globalization is considered and defined is quite closely associated with principles, values, and worldviews. The understanding of globalization and its impacts have strong implications on the possible readings of the contemporary world as well as on the role of men and women in its construction and the possibilities of action and struggle (Campos & Canavezes, 2007, pp. 10–11). Thus, Anthony Giddens (1991) defined globalization as:

> the "intensification of social relations on a worldwide scale, linking distant localities in such a way that local events are shaped by events occurring many miles away and vice versa" (Giddens, 1991, p. 69).

John Gray (1999) then maintained that globalization is:

> . . . the worldwide expansion of industrial production and new technologies promoted by the unrestricted mobility of capital and total freedom of trade (Gray, 1999, p. 16).

Globalization is an ongoing, dynamic, and changeable process (Campos & Canavezes, 2007, pp. 12), or rather, the 'idea of globalization as an inevitable dynamic functions':

> The idea of globalization as an inevitable dynamic functions as a legitimation for an attitude of unaccountability in the face of possible negative consequences of the ongoing globalization process" (Campos & Canavezes, 2007, pp. 11). Therefore, "globalization has a history and this is part of the trajectory of capitalism and the market economy. Globalization is not a purely economic and technological phenomenon, it is a complex and multidimensional process (involving different actors and touching different spheres of life of contemporary men and women). Globalization does not evolve impartially; its impacts can and should be discussed. There is an important space for the action of nation-states as well as for the individual and organized intervention of people, with emphasis on union action (Campos & Canavezes, 2007, pp. 12).

In short, when we talk about globalization, we must analyze it from several different perspectives as follows:

(a) Historical – It is not a recent project, but an old one, which has been shaping and improving with time. For example, the Greeks, the Romans, the Phoenicians, the Discoveries, the Industrial Revolution, the French Revolution, among others, all contributed events or movements that have made possible the affirmation of a world economy.
(b) Economic and/or technological – Globalization has made it possible to improve the quality of life of the populations and has provided technological innovations with global impact.
(c) Social, Political, and Cultural – Globalization has brought quality of life to populations, with access to new products, new cultures, and new ways of being and living. In this respect, it is important to underline, as Campos and Canavezes do, that in the cultural field, technological evolution is a neuralgic point of globalization. Specifically, it is the planetary extension of the means of accessibility and communication (personal, institutional, and social) and the

> generalization of computer means that make possible immediate and universally available information flows. The dynamics of globalization produces, simultaneously, more uniformity and more diversity (Campos & Canavezes, 2007, pp. 73–75).

On the other hand, at the political level, globalization has allowed multilateral negotiations and the adoption of international agreements in different areas, namely the liberalized international trade regime without customs barriers. Examples include the General Agreement on Tariffs and Trade (GATT), 1947; the Association of Southwest Asian Nations (ASEAN), 1967; the European Union (EU), 1951; the North American Free Trade Agreement (NAFTA), 1994; and the World Trade Organization (WTO), 1995. This is why international trade comprises a vast network of trade relations involving practically all of the economies from the different parts of the globe, and its impacts go far beyond the commercial sector of the economy (Campos & Canavezes, 2007, pp. 24–25).

On the other hand, human rights emerge when man is placed as the subject of the legal system. As António Teixeira Fernandes states, the core of the problem of human rights began, therefore, by referring to the defense of each person's private sphere and the limitation of the power of the State. They appear as a protection given to the individual to live a dignified human life, defended against the arbitrary and tyrannical rule of others. At their origin, they are linked to an individualistic philosophy and the social contract theory. According to contractualism, before the State existed, there were only natural rights, that is, rights that derived from man's own nature. Through the social contract, individuals obey authority, also acquiring the right to the protection of their life, liberty, and property. Power is bound by the clauses of an initial contract, on which its legitimacy depends. If it does not fulfill its obligations, citizens also have the right not to fulfill theirs (Fernandes, 2009, p. 12). Thus, at birth, man acquires personality and legal capacity; that is, the susceptibility to be a holder of rights and obligations. However, human rights as we know them today were not born all at once; they were built, cemented, perfected, and improved with moral and social claims.

As Fernanda Schaefer (2009) argued:

> [considering] its historical conceptual evolution, at the same time, one can define human rights as a right marked by universality and indivisibility" (2009, p. 80). In this sense, Norberto Bobbio states that, "human rights are born as universal natural rights; they develop as particular positive rights to finally find their full realization as universal positive rights (1992, p. 30).

In this sense, according to Fernanda Schaefer:

> Besides being universal and indivisible, human rights are inseparable from democracy and development; one does not exist without the other, which demands an idea (even if utopian) of ethical globalization and solidarity" (Schaefer, 2009, p. 81). Thus, she states that "[the] first legal texts that contained ideas and a few provisions on human rights were the English Magna Carta of 1215; The Petition of Rights (1628) and The Habeas Corpus Act (1679), both from England; the English Bill of Rights (1689); the Declaration of Independence of the United States of America (1776), the Declaration of the Rights of Man and of the Citizen

> (1789), the French Constitution (1791), (. . .and) the Universal Declaration of Human Rights, (1948) (Schaefer, 2009, p. 80).

Indeed, as Daniela Mateus de Vasconcelos stated.

> Human rights have become, since the end of World War II and, more intensely, since the 1990s, a central issue on the international agenda that is being treated as a global phenomenon and not just an issue reserved for national jurisdictions. The establishment of the Nuremberg Tribunal (1945) in Germany was an important step towards establishing the foundations of justice beyond borders and introducing the notion of crime against humanity in the international legal arena (. . .). It also brought to light the need for the emergence of a normative framework for the international protection of human rights with the aim of breaking, in a way, with the principle of absolute sovereignty of states (de Vasconcelos, 2009, p. 2).

Moreover, International Human Rights Law (IHL) is essentially based on the Universal Declaration of Human Rights, also known as the Universal Declaration of Human Rights proclaimed by Resolution 217 A of the United Nations General Assembly on December 10, 1948. International Human Rights Law:

> . . . is a set of international norms, conventional or customary, that stipulate about the behavior and benefits that people or groups of people can expect, or demand from the Government. Human rights are rights inherent to all people because of their status as human beings. Many unconventional principles and guidelines (programmatic law) are also part of the set of international human rights standards (International Human Rights Law, 2018, p. 2).

Thus, the main conventional sources of universal DIDH are: (a) Convention on the Prevention and Punishment of the Crime of Genocide (1948);[2] (b) International Convention on the Elimination of All Forms of Racial Discrimination (1965);[3] (c) International Covenant on Civil and Political Rights (1966);[4] (d) International Covenant on Economic, Social, and Cultural Rights (1996);[5] (e) Convention on the

[2] Convention on the Prevention and Punishment of the Crime of Genocide - Approved and proposed for signature and ratification or accession by General Assembly resolution 260A (III) of 9 December 1948. Entry into force:12 January 1951, in accordance with article XIII. This Convention says that the genocide is condemned "by the civilized world".

[3] International Convention on the Elimination of All Forms of Racial Discrimination, adopted and opened for signature and ratification by General Assembly resolution 2106 (XX) on 21 December 1965; entry into force 4 January 1969, in accordance with Article 19. This Convention says that "one of the purposes of the United Nations is to promote and encourage universal respect for and observance of human rights and fundamental freedoms for all, without distinction as to race, sex, language, or religion".

[4] International Covenant on Civil and Political Rights, adopted and opened for signature, ratification, and accession by General Assembly resolution 2200A (XXI) on 16 December 1966; entry into force 23 March 1976, in accordance with Article 49. This International Covenant says that "recognition of the inherent dignity and of the equal and inalienable rights of all members of the human family is the foundation of freedom, justice, and peace in the world".

[5] International Covenant on Economic, Social, and Cultural Rights, adopted and opened for signature, ratification, and accession by General Assembly resolution 2200A (XXI) on 16 December 1966; entry into force 3 January 1976, in accordance with article 27. This International Covenant says that "the ideal of free human beings enjoying freedom from fear and want can only be achieved

Elimination of All Forms of Discrimination against Women (1979);[6] (f) Convention against Torture and Other Cruel, Inhuman, or Degrading Treatment or Punishment (1984);[7] and (g) Convention on the Rights of the Child (1989).[8] On the other hand, the main regional instruments are: (a) American Declaration of the Rights and Duties of Man (1948);[9] (b) Convention for the Protection of Human Rights and

if conditions are created whereby everyone may enjoy his economic, social, and cultural rights, as well as his civil and political rights."

[6]Convention on the Elimination of All Forms of Discrimination against Women, adopted and opened for signature, ratification, and accession by General Assembly resolution 34/180 on 18 December 1979; entry into force 3 September 1981, in accordance with article 27(1). This Convention says that, "despite these various instruments, extensive discrimination against women continues to exist. Discrimination against women violates the principles of equality or rights and respect for human dignity, is an obstacle to the participation of women, on equal terms with men, in the political, social, economic and cultural life of their countries, hampers the growth of the prosperity of society and the family and makes more difficult the full development of the potentialities of women in the service of their countries and of humanity. In situations of poverty, women have the least access to food, health, education, training, and opportunities for employment and other needs."

[7]Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment, adopted and opened for signature, ratification, and accession by General Assembly resolution 39/46 of 10 December 1984; entry into force on 26 June 1987, in accordance with article 27 (1). This Convention says that, "the term "torture" means any act by which severe pain or suffering, whether physical or mental, is intentionally inflicted on a person for such purposes as obtaining from him or a third person information or a confession, punishing hum for an act he or a third person has committed or is suspected of having committed, or intimidating or coercing him or a third person, or for any reason based on discrimination of any kind, when such pain or suffering is inflicted by or at the instigation of or with the consent or acquiescence of a public official or other person acting in an official capacity. It does not include pain or suffering arising only from, inherent in, or incidental to lawful sanctions."

[8]Convention on the Rights of the Child, adopted and opened for signature, ratification, and accession by General Assembly resolution 44/25 on 20 November 1989; entry into force 2 September 1990, in accordance with article 49. This Convention says that, "in the Universal Declaration of Human Rights, the United Nations has proclaimed that childhood is entitled to special care and assistance. The family, as the fundamental group of society and the natural environment for the growth and well-being of all its members and particularly children, should be afforded the necessary protection and assistance so that it can fully assume its responsibilities within the community. The child, for the full and harmonious development of his or her personality, should grow up in a family environment, in an atmosphere of happiness, love, and understanding."

[9]American Declaration of the Rights and Duties of Man, adopted at the Ninth American International Conference, Bogotá, 1948. This Declaration says that, "the American States recognized that the essential human rights do not derive from the fact that he is a citizen of a certain State, but from the fact that rights are based on the attributes of the human person."

Fundamental Freedoms (1950);[10] (c) merican Convention on Human Rights (1969);[11] (d) African Charter on Human and Peoples' Rights (1981).[12]

Many international instruments exist for the protection of human rights, some universal and others regional, although we still have no universally binding international instrument for the protection of the most basic human rights, such as a Universal Convention on Human Rights. Perhaps this is why the value of human life and human rights are not respected equally in all parts of the world, despite the fact that, like many other international instruments, the Rome Statute of the International Criminal Court recognizes in its preamble, "*in the course of this century millions of children, men and women have been subjected to unimaginable atrocities that deeply shock the conscience of mankind; [we recognize] that crimes of such gravity constitute a threat to the peace, security and welfare of mankind; [we recall] that it is the duty of every State to exercise its criminal jurisdiction over those responsible for international crimes"* (Brito & Freitas, 2018, p. 265).

In addition, this Statute of the International Criminal Court has the merit of defining in Article 7 (1), (2), and (3), under the title (crime against humanity), a set of concepts and fundamental human rights whose violation is an attack on the most basic human rights. Thus, crimes against humanity are any of the following acts when committed as part of a widespread or systematic attack against any civilian population,[13] with knowledge of the attack: (a) Murder; (b) Extermination;[14]

[10] Convention for the Protection of Human Rights and Fundamental Freedoms, signed in Rome on 4/11/1950, says that "[reaffirming] their profound belief in those fundamental freedoms which are the foundation of justice and peace in the world and are best maintained on the one hand by an effective political democracy and on the other by common understanding and observance of the human rights upon which they depend".

[11] American Convention on Human Rights, signed at the Inter-American Specialized Conference on Human Rights, San José, Costa Rica, November 22, 1969. This Convention states that "recognizing that essential human rights do not derive from the fact that he or she is a national of a particular state, but rather from the fact that they are based on the attributes of the human person, which is why they justify international protection, which is conventional in nature, supporting or complementary to that offered by the domestic law of American states.

[12] African Charter on Human and Peoples' Rights, Banjul Charter, approved by the Ministerial Conference of the Organization of African Unity (QUA) in Banjul, The Gambia, in January 1981 and adopted by the XVIII Assembly of Heads of State and Government of the Organization of African Unity (QUA) in Nairobi, Kenya on 27 July 1981. This Charter states that "on the one hand, the fundamental rights of the human being are based on the attributes of the human person, which justifies its international protection, and that, on the other hand, reality and respect for the rights of peoples must necessarily guarantee human rights".

[13] "Attack directed against a civilian population" means any conduct involving the multiple commission of acts referred to in paragraph 1 against a civilian population, pursuant to, or in furtherance of a State or organizational policy to commit such acts.

[14] "Extermination" comprises the intentional subjection to conditions of life, such as the deprivation of access to food or medicine, in order to cause the destruction of a part of the population;

(c) Slavery;[15] (d) Deportation or forcible transfer of a population;[16] (e) Imprisonment or other form of severe deprivation of physical liberty in violation of fundamental rules of international law; (f) Torture;[17] (g) Rape, sexual slavery, forced prostitution, forced pregnancy,[18] forced sterilization, or any other form of violence in the sexual field of comparable gravity; (h) Persecution[19] of an identifiable group or collectivity on political, racial, national, ethnic, cultural, religious, or gender-related grounds[20] as defined in paragraph 3, or on the basis of other criteria universally recognized as unacceptable in international law, in connection with any act referred to in this paragraph or any crime within the jurisdiction of the Court; (i) Forced disappearance of persons;[21] (j) Apartheid crimes;[22] (k) Other inhumane acts of a similar character intentionally causing great suffering or serious injury or affecting mental or physical health (Brito & Freitas, 2018, p. 268).

However, and despite these discriminations of crimes against humanity and their interpretations, it is worth remembering that no man is illegal and that the fundamental rights of the human being are based on the attributes of the human person, so it is necessary to liberalize the human being through human rights and implement the globalization of human rights in the world, because we already know how to attack humanity and man. Therefore, the progressive liberalization of human rights will allow a global standardization of the most elementary rights, regardless of man's geographic circumscription. Man and human rights will be, with the progressive liberalization and globalization, truly equal anywhere in the world.

[15] "Slavery" means the exercise of any or all powers attached to the right of ownership over a person and includes the exercise of such power in the course of trafficking in persons, in particular women and children.

[16] "Deportation or forcible transfer of population" means the coercive displacement of people by expulsion or other coercive act, from the area in which they are lawfully present, without any reason recognized in international law.

[17] "Torture" means the act by which severe pain or suffering, whether physical or mental, is intentionally inflicted on a person in the custody or under the control of the accused; this term does not include pain or suffering arising only from, inherent in, or incidental to lawful sanctions.

[18] "Forcible pregnancy" means the unlawful deprivation of liberty of a woman who has been forcibly impregnated for the purpose of altering the ethnic composition of a population or committing other serious violations of international law. This definition can in no way be interpreted as affecting domestic law provisions relating to pregnancy.

[19] "Persecution" means the intentional and severe deprivation of fundamental rights in violation of international law for reasons related to the identity of the group or collectivity concerned.

[20] "Sex" encompasses the male and female sexes, within the context of society, and should not be given any other meaning.

[21] "Enforced disappearance of persons" means the arrest, detention, or abduction of persons by or with the authorization, support, or acquiescence of a State or a political organization, followed by a refusal to acknowledge such a state of deprivation of liberty or to provide any information on the status or location of such persons, for the purpose of denying them the protection of the law for an extended period of time.

[22] "Crime of apartheid' means any inhumane act analogous to those referred to in paragraph 1, committed in the context of an institutionalized regime of systematic oppression and domination by one racial group over one or others and with the intention of maintaining that regime.

3.3 Global Citizenship

It is possible to say that being a citizen means having rights and duties as enshrined in the United Nations Charter.[23] In fact, with the aim of enshrining these rights and duties, this Charter reaffirms the following:

> to reaffirm faith in fundamental human rights, in the dignity and worth of the human person, in the equal rights of men and women and of nations large and small, and to establish conditions under which justice and respect for the obligations arising from treaties and other sources of international law can be maintained, and to promote social progress and better standards of life in larger freedom (Charter of the United Nations, 1945, p. 1).

Thus, the essence of citizenship lies essentially in Article 1(2), (3), and (4) of this Charter:

> to develop friendly relations among nations based on respect for the principle of equal rights and self-determination of peoples, and to take other appropriate measures to strengthen universal peace; to achieve international co-operation in solving international problems of an economic, social, cultural, or humanitarian character, and in promoting and encouraging respect for human rights and for fundamental freedoms for all without distinction as to race, sex, language, or religion; and to be a centre for harmonizing the actions of nations in the attainment of these common ends" (Charter of the United Nations, 1945, p. 2).

Citizenship resides in equality and the right to a dignified life in various parameters of life in society, namely in the civil, political, social, cultural, economic, and environmental, among others. Thus, as Nilda Teves Ferreira (1993) argued that citizenship was based on 'the fundamental equality of people':

> . . . resulting from integration, from the full participation of the individual in all instances of society; developing as an institution, citizenship puts the inequalities of the class system in check (1993, p. 74).

It can be affirmed, therefore, that the notion of citizenship is correlated with the notion of the Nation, that is, a group of individuals who constitute an autonomous political society, fixed in a given territory, governed by its own laws and subordinated to a central power. These individuals are historically linked by the same language, culture, traditions, and common interests and aspirations, and it is therefore the sovereign state of this Nation that scrupulously guarantees compliance with and respect for rights and obligations, which means that:

> . . . every man, as an expression of the species, has rights inherent to his human nature, which are, however, exercised in the context of citizenship" (Alves, 2005, p. 44).

However, the essence of man and the protection of human rights cannot and must not be restricted to citizenship granted by a state. Man is by his very nature a free citizen and a global citizen, and human rights must therefore be safeguarded independent of the state of origin or birth and/or the state in which he is located. Man is free by

[23] The United Nations Charter was signed in San Francisco on June 26, 1945, at the end of the United Nations Conference on International Organization and came into force on October 24, 1945.

nature, and his freedom must be translated into international instruments to safeguard the most basic human rights.

In this respect, we must reflect on whether, with globalization, the concepts of Regional Human Rights and citizenship should not be changed. Does it make any sense to have regional international instruments to safeguard human rights? Does it make any sense to have citizenship circumscribed geographically to safeguard the most elementary rights and duties of the citizen, to a national state? (Oriani & Oriani, 2008, p. 43). We think not! In fact, we believe that the international community should adopt an international instrument of universal character, such as the Universal Convention on Human Rights, as well as a global citizenship, in order to create 'an effective "world society", that is, a society in which the main historical processes and events occur and unfold on a global scale' (Alvarez, 1999, p. 97). However, as it is necessary for the international community to understand the importance and pertinence of the consecration of global or world policies before granting global citizenship. It is fundamental that the ordinary citizen or national of any state realises that he is also a global citizen, and therefore his contribution to the defence of global human rights does not benefit him.

3.4 Another World Is Possible – The Importance of World Forums

Globalization has allowed us to assimilate the need to refocus the rights of man on man. In other words, with globalization, we have realized that the problems and the attacks on the most basic human rights do not vary from state to state, but are global problems that deserve global attention and universal international instruments to safeguard the most basic human rights. In fact, another world is possible; all that is needed is the will of states and the International Community to change the current conventional status quo. As a matter of fact, this purpose has been proclaimed in several World Forums that, directly or indirectly, reiterate that another world is possible and, for this purpose, present several guidelines, policies, and measures. In this context, we will restrict our analysis to two fundamental World Forums, mainly because they call for concerted and global action in the defense and protection of human rights. Thus, we will focus our analysis on: (a) the World Economic Forum (WEF), also known as the Davos Forum,[24] and (b) the United Nations Millennium Summit and the Millennium Development Goals (MDGs), as well as the Sustainable Development Goals (SDGs).

[24] The forum was created in 1971 under the name European Management Forum.

3.4.1 World Economic Forum (WEF)

The World Economic Forum is an international organization without profit, political, partisan, and/or nationalist ties, founded in 1971, by Klaus Martin Schwab. It is known for its annual meetings in Davos, Switzerland, as well as other regional meetings where the main individuals from various sectors of society meet, with the objective of understanding the impacts of globalization on the world, discussing and presenting proposals to improve the current conditions of the world, and/or examining the most urgent issues faced worldwide.

According to André Bona, the main topics discussed at the World Economic Forum meetings are: (a) foreign trade; (b) economic development; (c) world economic problems; (d) social inclusion; (e) social responsibility; (f) social development; (g) sustainable development; (h) inequality and concentration of income; (i) social and economic transformations, collaboration, creativity, and innovation; (j) education; (k) new measures to improve the future of the world; and (l) the balance of power in the international sphere (Bona, 2020, p.1). Thus, and as a way of keeping the theme current, we will restrict ourselves, at this point, to the analysis in the latest World Economic Forum report "The Global Risks Report 2021" (WEF – The Global Risks Report, 2021). This is because, as UN Secretary-General António Guterres asserted, "the international community needs your cooperation more than ever, to help change the course, end fragility, avert climate catastrophe, and build the just and sustainable future that is needed. . . . Covid-19 generated the worst economic crisis in nearly a century, exposing inequalities and fragility in countries. For Guterres, the time has come for truth and to put the world on track" (Guterres, 2021, p. 1).

Precisely because of this call to action, the Global Risks report is a key working tool for states and governments, in that it points out the disruptive implications of major emerging risks or global fractures and presents new global challenges and charts a path forward. Accordingly, this report identifies three types of risks that respondents highlighted as the most important:

(I) Short-term risks (0–2 years) – Clear and present dangers: (a) Infectious diseases (58.0%), (b) Livelihood crises (55.1%), (c) Extreme weather events (52.7%), (d) Cybersecurity failure (39.0%), (e) Digital inequality (38.3%), (f) Prolonged stagnation (38.3%), (g) Terrorist attacks (37.8%), (h) Youth disillusionment (36.4%), (i) Social cohesion erosion (35.6%), and (j) Human environmental damage (35.6%). Essentially, the short-term risks are related to contagious diseases (pandemics), employment crises, climate change, digital inequality and the insecurity of the Internet, cybersecurity.

(II) Medium-term risks (3–5 years) – Knock-on effects: (a) Asset bubble burst (53.3%), (b) IT infrastructure breakdown (53.3%), (c) Price instability (52.9%), (d) Commodity shocks (52.7%), (e) Debt crises (52.3%), (f) Interstate relations fracture (50.7%), (g) Interstate conflict (49.5%), (h) Cybersecurity failure (49.0%), (i) Tech governance failure (48.1%), and (j) Resource geopolitization (47.9%). Essentially, medium-term risks are related to indirect economic and

technological risks, failures with technological infrastructures, price instability, and debt crises.

(III) Long-term risks (5–10 years) – Existential threats: (a) Weapons of mass destruction (62.7%), (b) State collapse (51.8%), (c) Biodiversity loss (51.2%), (d) Adverse tech advances (50.2%), (e) Natural resource crises (43.9%), (f) Social security collapse (43.4%), (g) Multilateralism collapse (39.8%), (h) Industry collapse (39.7%), (i) Climate action failure (38.3%), (j) Backlash against science (37.8%). Essentially, long-term risks are related to weapons of mass destruction, collapse of public services, loss of biodiversity and adverse technological advances, and environmental crisis (WEF – The Global Risks Report, 2021, p. 11).

However, we believe that one of the greatest risks is the stratification of global society between citizens with rights and citizens without rights, varying according to state, ancestry, gender, race, language, territory of origin, religion, political or ideological beliefs, education, economic situation, social status, or sexual orientation. In fact, we believe that the safeguarding of the most basic human rights is conditioned by some global risks, regardless of whether they are short-, medium-, and/or long-term risks, such as infectious diseases, livelihood crises, climate change, terrorist attacks, geopolitization of resources, and weapons of mass destruction. This is because all of these risks put the dignity of the human person at stake, regardless of the state of origin and/or the state in which these risks or violations occur, so a binding international human rights instrument that projects them globally is essential. Thus, in a time of immense global economic and social challenges impacting human rights, it has become clear that it is necessary to look at human rights and their violation from a global perspective so that human risks are mitigated globally.

3.4.2 United Nations Millennium Summit

The United Nations Millennium Declaration is a landmark document for the new century. Approved at the Millennium Summit, held September 6–8, 2000, in New York. The declaration reflects the concerns of 147 Heads of State and Government and 191 countries, who attended the largest ever meeting of world leaders (Annan, 2000, p. 2). This Millennium Declaration is structured in eight fundamental points: (I) Values and principles; (II) Peace, security, and disarmament; (III) Development and poverty eradication; (IV) Protection of our common environment; (V) Human rights, democracy, and good governance;[25] (VI) Protection of vulnerable

[25] With regard to paragraph V - Human Rights, Democracy and Good Governance, the Declaration states the following: "24. We will spare no effort to promote democracy and strengthen the rule of law, as well as respect for all internationally recognized human rights and fundamental freedoms, including the right to development. 25. We therefore resolve: To respect and fully enforce the Universal Declaration of Human Rights; to strive to achieve the full protection and promotion of the

groups;[26] (VII) Responding to the special needs of Africa; and (VIII) Strengthening the United Nations (United Nations Millennium Declaration, 2000, pp.1–16).

In practice, this document/declaration is the recognition that there are truly global problems that require global attention from states in their resolution. The analysis of the various points of the Declaration allows us to conclude that the safeguarding of human rights and the protection of vulnerable groups, as well as other topics related to these themes, require global approaches by states and the international community.

In this regard, Kofi A. Annan pointed out that, "in proposing the Summit, it was [with the intention of] using the symbolic force of the Millennium to meet the real needs of people around the world.... The leaders set concrete targets, such as halving the proportion of people living in extreme poverty, providing clean water and education for all, reversing the spread of HIV/AIDS, and achieving other development goals. They asked for the strengthening of UN peace operations, so that vulnerable communities [could] count [on them] in difficult times. And they also asked us to combat injustice and inequality, terror and crime, and to protect our common heritage, the Earth, for the benefit of future generations" (Annan, 2000, p. 2).Thus, the Heads of State and Government recognized as the values and principles to be considered, in addition to the responsibilities that we all have towards our societies, the following:

(a) the collective responsibility to respect and defend the principles of human dignity, equality, and equity, at the global level, especially for the most disadvantaged and particularly the children of the world, to whom the future belongs;

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civil, political, economic, social and cultural rights of all persons in all countries; to enhance in all countries the capacity to apply democratic principles and practices and respect for human rights, including the rights of minorities; to fight against all forms of violence against women and to implement the Convention on the Elimination of All Forms of Discrimination Against Women; to adopt measures to ensure respect for and protection of the human rights of migrants, migrant workers and their families, to put an end to acts of racism and xenophobia, which are increasingly frequent in many societies, and to promote greater harmony and tolerance in all societies; to work collectively to achieve more inclusive political processes that allow for the effective participation of all citizens, in all countries; end to ensure freedom of the media to fulfil their indispensable function and the right of the public to have access to information".

[26]With regard to paragraph VI - Protection of Vulnerable Groups, this Declaration states the following: "We will spare no effort to ensure that children and all civilian populations who suffer disproportionately from the consequences of natural disasters, acts of genocide, armed conflict, and other humanitarian emergencies receive all the assistance and protection they need to enable them to resume a normal life as soon as possible. We therefore decide to increase and strengthen the protection of civilians in complex emergencies, in accordance with international humanitarian law; enhance international cooperation, including sharing the burden on and coordinating humanitarian assistance to refugee-receiving countries; and assist all refugees and displaced persons to return home voluntarily in safety and dignity and to reintegrate smoothly into their societies; and to encourage the ratification and full implementation of the convention on the rights of the child and its optional protocols on the involvement of children in armed conflict and on the sale of children, child prostitution, and child pornography".

(b) the major challenge of making globalization today a positive force for all the peoples of the world, since, while it is true that globalization offers great possibilities, at present its benefits, as well as its costs, are very unevenly distributed;
(c) recognize that developing countries and countries with economies in transition face serious difficulties in addressing this fundamental problem, and therefore consider that only through broad and sustained efforts to create a common future, based on our common human condition in all its diversity, can globalization be fully equitable and inclusive;
(d) reiterate that efforts should include the adoption of policies and measures at the global level that correspond to the needs of developing countries and economies in transition and that are formulated and implemented with their effective participation;
(e) consider that certain fundamental values are essential for international relations in the twenty-first century. These include freedom, equality, solidarity, tolerance, respect for nature, and common responsibility (United Nations Millennium Declaration, 2000, pp. 2–4).

That is, world leaders commit their nations to stronger global efforts for peace, human rights, democracy and good governance, environmental sustainability and poverty eradication and to support the principles of human dignity, equality, and equity. To this end, a roadmap has been designed to achieve the commitments outlined in the Millennium Declaration, also referred to as the "Millennium Development Goals (MDGs)" by the year 2015:[27] (1) Halve extreme poverty and hunger; (2) Achieve universal primary education; (3) Promote gender equality; (4) Reduce by two-thirds child mortality; (5) Reduce by three-quarters the maternal mortality rate; (6) Combat HIV/AIDS, malaria, and other major diseases; (7) Ensure environmental sustainability; and (8) Create a global partnership for development.

However, according to Paulo Gonzaga Mibielli de Carvalho and Frederico Cavadas Barcellos, "[t]he Millennium Development Goal (MDG) [was] the most successful effort to combat poverty. There is no doubt that the MDGs were a success from the political point of view, especially for the UN, which achieved a projection in the social area that it had never achieved before" (de Carvalho & Barcelos, 2014, p. 222).

In this sense, also, the Lancet and London International Development Centre Commission (2010) stresses that "[clearly] the MDGs have had notable success in encouraging global political consensus, providing a focus for advocacy, improving the targeting and flow of aid, and improving the monitoring of development projects.

[27] The historical background to these MDGs is the discussions held within the European Union that culminated in a 1996 document, "Shaping the 21st Century: The Contribution of Development Cooperation" (OECD), which set goals and targets for 2015, divided into three areas: economic well-being, social development, and environmental sustainability and regeneration, as well as the document "We the peoples: the Role of the United Nations in the 21st Century", launched in 2000 by UN Secretary-General Kofi Annan, whose main theme was the eradication of poverty.

However, MDGs have also encountered a range of common challenges. Challenges with the conceptualisation and execution of the MDGs arise at the three discrete levels on which they are constructed: goals, targets, and indicators. The very specific nature of many goals, reflecting their diverse, independent origins, leaves considerable gaps in coverage and fails to realise the synergies that could arise across their implementation. We draw attention to particular synergies between education, health, poverty, and gender. In some cases, targets present a measure of goal achievement that is too narrow or might not identify a clear means of delivery. Other challenges encountered by several MDGs include a lack of clear ownership and leadership internationally and nationally, and a problem with equity in particular. Issues of equity arise because many goals target attainment of a specific minimum standard—e.g, of income, education, or maternal or child survival. To bring people above this threshold might mean a focus on those for whom the least effort is required, neglecting groups that, for geographical, ethnic, or other reasons, are more difficult to reach, thereby increasing inequity" (Waage et al., 2010, p. 1).

However, the paradox of the MDGs is that their proposal to achieve a set of human development goals by 2015 has failed, despite all efforts. This is because, as Carvalho & Barcelos state, "without going into the merits of the number of goals, it should be noted that the millennium declaration (UN, 2000) is more comprehensive in terms of themes than the MDGs. The themes "peace, security, and disarmament" and "human rights, democracy, and governance" were omitted entirely. Other criticisms: (i) excessive focus on international targets which, implicitly, would also be national targets, without taking into consideration the regional inequalities and differences between the different countries; (ii) it pays little attention to existing inequalities within the population and between specific social groups within a country; (iii) it is based on minimum achievements (for example, basic education), failing to capture demands from middle-income countries (such as secondary and university education); (iv) targets of poverty countries, when poverty is concentrated especially in middle-income countries; (v) MDGs are mainly based on relative target reductions, which have two limitations: (a) they tend to be inversely proportional to the initial level, thus placing a greater burden on poorer countries with fewer resources; and (b) depending on population growth, the relative (%) target can be reached, and at the same time, the problem could have increased in absolute terms (number of people affected); (vi) they do not address the means to the ends (for example, institutions and structural changes) or general policy principles. It is an agenda, but not a development strategy; (vii) the goals are quantitative rather than qualitative, for example: education quality goals were left out; (viii) they distort development aid policies that become overly focused on the MDGs, leaving aside other areas; (ix) they distort public policies that become overly focused on achieving MDG goals in the short term." (de Carvalho & Barcelos, 2014, p. 227).

However, and despite the arguments identified above, it should be emphasized that the Millennium Development Goals were not, however, a failed experience at all. On the contrary, they served as a catalyst for the Sustainable Development Goals (SDGs), also known as the 2030 Agenda, consisting of 17 goals that symbolize a new common vision for humanity. Furthermore, I believe that the states' recognition

of global problems that need global solutions, because they affect the global citizenry regardless of the State of origin, is already a substantial gain for humanity and for the dignity of man and his human rights. In this context, it is worth noting that the Sustainable Development Goals (SDGs) were adopted by world leaders at a summit held in New York on September 25, 2015, by the United Nations (UN) resolution entitled "Transforming Our World: Agenda 2030 for Sustainable Development," also entitled "Post-2015 Agenda or Agenda 2030." This resolution came into effect on January 1, 2016, and set new and broad goals that aimed to address the needs of populations in both developed and developing countries.

Thus, the 2030 Agenda sets 169 goals to be achieved in the next 15 years and 17 sustainable development goals (SDGs) that we identify below: (1) Eradicate poverty; (2) Eradicate hunger; (3) Ensure quality health; (4) Ensure quality education; (5) Ensure gender equality; (6) Provide clean water and sanitation; (7) Provide renewable and affordable energy; (8) Introduce decent work and economic growth; (9) Ensure industry, innovation, and infrastructure; (10) Reduce inequality; (11) Create sustainable cities and communities; (12) Ensure sustainable production and consumption; (13) Promote climate action; (14) Protect marine life; (15) Protect terrestrial life; (16) Promote peace, justice, and effective institutions; and (17) Establish partnerships to implement the goals (Transforming our world: The 2030 Agenda for sustainable development, 2015, p. 12).

Indeed, as the Cities Forum websites have said on this topic, "[Agenda 2030 is] much more ambitious than the previous Millennium Agenda [2000 and 2015], primarily because it includes 'zero goals', i.e. the express goal of 'leaving no one behind' and taking as achievable the eradication of extreme poverty everywhere by 2030, ending hunger and all forms of malnutrition, or achieving universal and equitable access to safe drinking water for all" (Forum Cities, 2016). In essence, Agenda 2030 has sought to strike a balance between the various dimensions of sustainable development, including economic, social, and environmental development while promoting peace, justice, and effective institutions. Indeed, UN Secretary-General Ban Ki-moon aptly portrays this instrument by reiterating "a list of things to do on behalf of peoples and the planet and a plan for success" (as cited in Guide on Sustainable Development – 17 goals to transform our world, 2015, p. 1), where we should all contribute to achieving this much sought-after success, and whose main responsibility for turning this vision into reality lies with the governments of the countries.

Therefore, on the topic of this work, Agenda 2030 provides a general set of policies and measures to be implemented by 2030, which safeguard to some extent children, migrants, underdeveloped countries, and particularly people with vulnerabilities. Agenda 2030 therefore provides for the implementation of the following by 2030:

- Reduce by at least half the proportion of men, women, and children of all ages living in poverty, in all its dimensions, according to national definitions;

- End hunger and ensure all people, in particular the poorest and those in vulnerable situations, including children, access to quality, nutritious, and sufficient food throughout the year;
- End all forms of malnutrition, including achieving by 2025 internationally agreed-upon targets on dwarfism and cachexia in children under five and meeting the nutritional needs of adolescents, pregnant and lactating women, and older people;
- Reduce the global maternal mortality rate to less than 70 deaths per 100,000 live births;
- End the preventable deaths of newborns and children under five, with all countries trying to reduce neonatal mortality to at least 12 per 1000 live births and mortality of children under five to at least 25 per 1000 live births;
- Ensure that all girls and boys complete primary and secondary education, which should be freely accessible, equitable, and of high quality and should lead to relevant and effective learning outcomes;
- Ensure that all girls and boys have access to quality early childhood development and pre-school care and education so that they are prepared for primary education;
- Eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the most vulnerable, including people with disabilities, indigenous peoples, and children in vulnerable situations;
- To build and improve physical facilities for education that are appropriate for children and sensitive to disability and gender equality and that provide safe, non-violent, and effective learning environments for all;
- Achieve universal and equitable access to safe and secure drinking water for all;
- Achieve access to adequate and equitable sanitation and hygiene for all and end open defecation, with special attention to the needs of women and girls and those in vulnerable situations;
- Accomplish full and productive employment and decent work for all women and men, including young people and people with disabilities, and equal pay for work of equal value;
- Empower and promote the social, economic, and political inclusion of all, regardless of age, gender, disability, race, ethnicity, origin, religion, economic, or other status;
- Ensure equal opportunities and reduce inequalities in outcomes, including through the elimination of discriminatory laws, policies, and practices and the promotion of appropriate legislation, policies, and actions in this regard;
- Reduce the transaction costs of remittances from migrants to less than 3% and eliminating remittance mechanisms with costs above 5%;
- Provide access to safe, accessible, sustainable, and affordable transport systems for all, improving road safety by expanding the public transport network, with special attention to the needs of vulnerable people, women, children, people with disabilities, and the elderly;
- Provide universal access to safe, inclusive, accessible, and green public spaces, particularly for women and children, older people, and people with disabilities;

- Support the least developed countries, including through technical and financial assistance, in sustainable and resilient construction using local materials (The Sustainable Development Agenda, 2015, pp. 1–2).

However, despite these policies and measures, some criticisms must be raised, since the agenda lacks a more fruitful treatment on some issues. For example, migration rights are superficially covered in SDGs 8, 10, and 17, and these documents are even silent on several current, sensitive, and relevant issues, such as addressing the rights of the Lesbian, Gay, Bisexual, Transvestite, Transsexual, and Transgender (LGBT) population. In addition, the SDGs do not emphasize the imperative of compliance with human rights or recognize its universal, indivisible, and interdependent character, with implications for the implementation of the agenda as a whole. Nevertheless, Agenda 2030 still provides for a number of other policies and measures to be implemented over the same period and specifically targets people with vulnerabilities, in particular children, but whose implementation will safeguard the most basic human rights, in particular:

- End all forms of discrimination against all women and girls everywhere;
- Eliminate all forms of violence against all women and girls in the public and private spheres, including trafficking and sexual and other exploitation;
- Eliminate all harmful practices, such as premature, forced, and child marriages and female genital mutilation;
- Adopt and strengthen sound policies and applicable legislation for the promotion of gender equality and the empowerment of all women and girls at all levels;
- Take immediate and effective measures to eradicate forced labour, end modern slavery and trafficking of persons, and ensure the prohibition and elimination of the worst forms of child labour, including the recruitment and use of child soldiers, and by 2025 end child labour in all its forms;
- Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular migrant women, and people in precarious employment;
- Facilitate the migration and mobility of people in an orderly, safe, regular, and responsible manner, including through the implementation of planned and well-managed migration policies;
- End the abuse, exploitation, trafficking, and all forms of violence and torture against children;
- Provide legal identity for all, including birth registration;
- Promote and enforce non-discriminatory laws and policies for sustainable development (The Sustainable Development Agenda, 2015, pp. 1–2).

However, Máximo (2015) argued that ‘SDS 17 carries greater robustness and breadth’:

> In the case of the revitalization of the global partnership for development, it is undeniable that SDS 17 carries greater robustness and breadth when compared to [Millennium Development Goal 8: Develop a Global partnership for development] MDG8, since it contains 19 targets that address issues such as finance, technology, capacity building, trade, policy

> and institutional coherence, and partnership among several stakeholders, among others. Nevertheless, these recommendations remain weak and open space "for key actors (richer countries, large corporations, and international organizations) to be free of responsibility for the high levels of poverty in the global community" (Máximo, 2015. p. 22).

In short, for countries to achieve their sustainable development goals, cities and states need to be more inclusive, safe, resilient, and sustainable in order to safeguard the most basic human rights. However, it should be noted that, in addition to these two World Forums, other World Forums have been held, such as the World Social Forum (WSF) (January 25–30, 2001), and all of them, directly or indirectly, call for the globalization of human rights and/or the necessary global protection of human rights by states.

3.5 The Human Rights Emergency – New Global Challenges

In the twenty-first century, or rather in the 3rd Millennium, we are obliged to rethink human rights, to emerge new rights, to consolidate current rights, as well as to implement global human rights. The 2nd millennium was the century of the consecration of several international legal instruments safeguarding the most elementary human rights, some of a universal character and others regional, either from the Council of Europe or the European Union, some of a binding character (hard law) and others not (soft law). Thus, for the sake of systematization, and although we do not exhaustively list all of the legal instruments adopted to date, we will redistribute some of these legal instruments into two types: universal international instruments and regional international instruments.

By listing these international legal instruments, we can understand that human rights evolve over time, or rather, they are refined and progressively expanded in time and space, first as soft law and gradually as hard law. Unfortunately, it also serves to make us realize that there is often a duplication of the rights safeguarded, whether in legal instruments of universal international scope or in international legal instruments of regional scope, regardless of their origin, Council of Europe, European Union, and/or other groupings of regional states from a political, economic, and social perspective.[28] In addition, we can also see that, internally, many states *per se* safeguard some human and fundamental rights, either in their constitutions or in their ordinary laws.

Consequetly, we have:

[28] A good example is the African Charter of Human Rights and People's Rights (Banjul Charter), adopted by the Ministerial Conference of the Organization of African Unity (OAU) in Banjul, The Gambia, in January 1981, and adopted by the XVIII Assembly of Heads of State and Government of the Organization of African Unity (OAU) in Nairobi, Kenya, on 27 July 1981.

(a) Universal International Instruments

Slavery Convention[29]	September 25, 1926
Charter of the United Nations[30]	June 26, 1945
Statute of the International Court of Justice[31]	June 26, 1945
Universal Declaration of Human Rights[32]	December 10, 1948
Convention on the Prevention and Punishment of the Crime of Genocide[33]	December 9, 1948
Convention for the Suppression of the Traffic in Persons and of the Exploitation of the Prostitution of Others[34]	March 21, 1950
Convention relating to the Status of Refugees[35]	July 28, 1951
Convention relating to the Status of Stateless Persons[36]	September 28,1954
Supplementary Convention on the Abolition of Slavery, the Slave Trade, and Institutions and Practices Similar to Slavery[37]	September 7, 1956

(continued)

[29] Entry into force 9 March 1927, in accordance with article 12. The Convention was amended by the Protocol done at the Headquarters of the United Nations, New York, on 7 December 1953; the amended Convention entered into force on 7 July 1955, the date on which the amendments, set forth in the annex to the Protocol of 7 December 1953, entered into force in accordance with article III of the Protocol.

[30] The Charter of the United Nations was signed on 26 June 1945, in San Francisco, at the conclusion of the United Nations Conference on International Organization, and came into force on 24 October 1945.

[31] The Statute of the International Court of Justice is an integral part of the Charter of the United Nations.

[32] Adopted and proclaimed by the United Nations General Assembly (resolution 217 A III) on 10 December 1948.

[33] Approved and proposed for signature and ratification or accession by General Assembly resolution 260 A (III) of 9 December 1948; entry into force 12 January 1951, in accordance with article XIII.

[34] Approved by General Assembly resolution 317 (IV) of 2 December 1949; entry into force 25 July 1951, in accordance with article 24.

[35] Adopted on 28 July 1951 by the United Nations Conference of Plenipotentiaries on the Status of Refugees and Stateless Persons convened under General Assembly resolution 429 (V) of 14 December 1950; entry into force 22 April 1954, in accordance with article 43.

[36] Adopted on 28 September 1954 by a Conference of Plenipotentiaries convened by Economic and Social Council resolution 526 A (XVII) of 26 April 1954; entry into force 6 June 1960, in accordance with article 39.

[37] Adopted by a Conference of Plenipotentiaries convened by Economic and Social Council resolution 608(XXI) of 30 April 1956 and done at Geneva on 7 September 1956; entry into force 30 April 1957, in accordance with article 13.

Protocol relating to the Status of Refugess[38]	January 31, 1967
International Covenant on Economic, Social and Cultural Rights[39]	December 16, 1966
International Covenant on Civil and Political Rights[40]	December 16, 1966
Optional Protocol to the International Covenant on Civil and Political Rights[41]	December 16, 1966
Second Optional Protocol to the International Covenant on Civil and Political Rights, aiming at the abolition of the death penalty[42]	December 15, 1989
International Convention on the Elimination of All Forms of Racial Discrimination[43]	December 21, 1965
Convention against Discrimination in Education[44]	December 14, 1960
Protocol instituting a Conciliation and Good Offices Commission to be Responsible for Seeking the settlement of any Disputes which may Arise between States Parties to the Convention Against Discrimination in Education[45]	December 10, 1962
United Nations Declaration on the Elimination of All Forms of Racial Discrimination[46]	November 20, 1963
Declaration on the Elimination of All Forms of Intolerance and of Discrimination Based on Religion or Belief[47]	November 25, 1981
Declaration of Fundamental Principles concerning the Contribution of the Mass Media to Strengthening Peace and International Understanding, to the	November 28, 1978

(continued)

[38] The Protocol was taken note of with approval by the Economic and Social Council in resolution 1186 (XLI) of 18 November 1966 and was taken note of by the General Assembly in resolution 2198 (XXI) of 16 December 1966. In the same resolution the General Assembly requested the Secretary-General to transmit the text of the Protocol to the States mentioned in article V thereof, with a view to enabling them to accede to the Protocol; entry into force 4 October 1967, in accordance with article VIII.

[39] Adopted and opened for signature, ratification and accession by General Assembly resolution 2200A (XXI) of 16 December 1966; entry into force 3 January 1976, in accordance with article 27.

[40] Adopted and opened for signature, ratification and accession by General Assembly resolution 2200A (XXI) of 16 December 1966; entry into force 23 March 1976, in accordance with Article 49.

[41] Adopted and opened for signature, ratification and accession by General Assembly resolution 2200A (XXI) of 16 December 1966; entry into force 23 March 1976, in accordance with Article 9.

[42] Adopted and proclaimed by General Assembly resolution 44/128 of 15 December 1989.

[43] Adopted and opened for signature and ratification by General Assembly resolution 2106 (XX) of 21 December 1965; entry into force 4 January 1969, in accordance with Article 19.

[44] Adopted by the General Conference of the United Nations Educational, Scientific and Cultural Organization at its 11th session, Paris, 14 December 1960.

[45] As adopted at the 29th plenary meeting, 10 December 1962.

[46] Proclaimed by the United Nations General Assembly in its resolution 1904 (XVIII) of 20 November 1963.

[47] Proclaimed by the United Nations General Assembly in its resolution 36/55 of 25 November 1981.

Promotion of Human Rights and to Countering Racialism, *apartheid* and incitement to war[48]	
Declaration on Race and Racial Prejudice[49]	November 27, 1978
Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities[50]	December 18, 1992
Convention on the Rights of the Child[51]	November 20, 1989
Optional Protocol to the Convention on the Rights of the Child on the involvement of children in armed conflict[52]	May 25, 2000
Optional Protocol to the Convention on the Rights of the Child on the sale of children, child prostitution and child pornography[53]	May 25, 2000
Convention on Protection of Children and Co-operation in Respect of Intercountry Adoption[54]	May 29, 1993
Convention 138 of the International Labour Organization (ILO) on Minimum Age for admission to employment[55]	June 27, 1973
Convention No. 182, of the International Labour Organization (ILO) concerning the prohibition and immediate action for the elimination of the Worst Forms of Child Labour[56]	June 17, 1999
Recommendation No. 190 of the International Labour Organization (ILO) concerning the prohibition and immediate action for the elimination of the Worst Forms of Child Labour[57]	June 17, 1999
Declaration of the Rights of the Child[58]	November 20, 1959

(continued)

[48] Proclaimed by the General Conference of the United Nations Educational, Scientific and Cultural Organization at its 20th session in Paris, France, on 28 November 1978.

[49] Adopted and proclaimed by the General Conference of the United Nations Educational, Scientific and Cultural Organization at its 20th session on 27 November 1978.

[50] Adopted by General Assembly resolution 47/135 of 18 December 1992.

[51] Adopted and opened for signature, ratification and accession by General Assembly resolution 44/25 of 20 November 1989; entry into force 2 September 1990, in accordance with article 49.

[52] Adopted and opened for signature, ratification and accession by United Nations General Assembly resolution 54/263 of 25/05/2000.

[53] Adopted and opened for signature, ratification and accession by United Nations General Assembly resolution 54/263 of 25/05/2000.

[54] Convention 33 of The Hague Conference on Private International Law (adopted at its 17th session on 29/05/1993).

[55] Adopted by the General Conference of the International Labour Organization at its 58th session, Geneva, 26 June 1973.

[56] Adopted by the General Conference of the International Labour Organisation at its 87th session, Geneva, 17 June 1999.

[57] Adopted by the General Conference of the International Labour Organisation at its 87th session, Geneva, 17 June 1999.

[58] Proclaimed by the United Nations Assembly on 20 November 1959.

Declaration of Social and Legal Principles and Welfare of Children, with special reference to Foster Placement and Adoption Nationally and Internationally [59]	December 3, 1986
Convention on the Elimination of All Forms of Discrimination against Women New York[60]	December 18, 1979
Optional Protocol to the Convention on the Elimination of All Forms of Discrimination against Women[61]	October 6, 1999
Convention No. 100 of the International Labour Organization (ILO) concerning Equal Remuneration for men and women workers for work of equal value[62]	June 29, 1951
Convention on the Political Rights of Women[63]	December 20, 1952
Declaration on the Elimination of Discrimination against Women[64]	December 18, 1979
Declaration on the Protection of Women and Children in Emergency and Armed Conflict[65]	December 14, 1974
Declaration on the Elimination of Violence against Women[66]	December 20, 1993
International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families[67]	December 18, 1990
Convention No. 97 of the International Labour Organization (ILO) concerning Migrant for Employment[68]	July 1, 1949
Convention No. 143 of the International Labour Organization (ILO) concerning Migrations in Abusive Conditions and the Promotion of Equality of Opportunity and Treatment of Migrant Workers[69]	June 24, 1975

(continued)

[59] Adopted by the United Nations General Assembly in its resolution 41/85 of 3 December 1986.

[60] Adopted and opened for signature, ratification and accession by General Assembly resolution 34/180 of 18 December 1979; entry into force 3 September 1981, in accordance with article 27(1).

[61] Adopted by the United Nations General Assembly in its resolution 54/4 of 6 October 1999 and opened for signature on 10 December 1999.

[62] Adopted by the General Conference of the International Labour Organization at its 34th session, Geneva, 29 June 1951.

[63] Opened for signature and ratification by United Nations General Assembly resolution 640 (VII) of 20 December 1952; entry into force in the international order 7 July 1954, in accordance with Article VI.

[64] Proclaimed by the United Nations General Assembly in its resolution 48/104 of 20 December 1993.

[65] Proclaimed by the General Assembly of the United Nations in its resolution 3318 (XXIX) of 14 December 1974.

[66] Proclaimed by the United Nations General Assembly in its resolution 48/104 of 20 December 1993.

[67] Adopted by the United Nations General Assembly in its resolution 45/158 of 18 December 1990; entry into force at the international level: 1 July 2003, in accordance with Article 87(1).

[68] Adopted by the General Conference of the International Labour Organisation at its 32nd session, Geneva, 1 July 1949.

[69] Adopted by the General Conference of the International Labour Organization at its 60th session, Geneva, 24 June 1975.

Protocol Against the Smuggling of Migrants by Land, Sea and Air, supplementing the United Nations Convention Against Transnational Organized Crime[70]	November 15, 2000
Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment[71]	December 10, 1984
Optional Protocol to the Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment[72]	December 18, 2002
International Convention for the Protection of All Persons from Enforced Disappearance[73]	December 20, 2006
Declaration on the Protection of All Persons from Being Subjected to Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment[74]	December 9, 1975
Manual on Effective Investigation and Documentation of Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment (Istanbul Protocol)[75]	December 18, 2002
Principles on the Effective Prevention and Investigation of Extra-legal, Arbitrary and Summary Executions[76]	May 24, 1989
Declaration on the Protection of All Persons from Enforced Disappearance[77]	December 18, 1992
United Nations Standard Minimum Rules for Non-custodial Measures (Tokyo Rules)[78]	December 14, 1990
Standard Minimum Rules for the Treatment of Prisoners[79]	July 31, 1957

(continued)

[70] Adopted and opened for signature, ratification and accession by the United Nations General Assembly resolution 55/25 of 15/11/2000. The European Union became party to this treaty on 06/09/2006.

[71] Adopted and opened for signature, ratification and accession by General Assembly resolution 39/46 of 10 December 1984; entry into force 26 June 1987, in accordance with article 27 (1).

[72] Adopted on 18 December 2002 at the 57th session of the General Assembly of the United Nations by resolution A/RES/57/199. Protocol is available for signature, ratification and accession as from 4 February 2003 (i.e. the date upon which the original of the Protocol was established) at United Nations Headquarters in New York.

[73] Adopted on 20/12/2006 by the United Nations General Assembly at its 61st session through resolution A/RES/61/177 and opened for signature in Paris on 06/02/2007.

[74] Adopted by the General Assembly of the United Nations in its resolution 3452 (XXX) of 9 December 1975.

[75] Commission on Human Rights, in its resolution 2000/43, and the General Assembly, in its resolution 55/89, drew Governments' attention to the Principles and strongly encouraged Governments to reflect on them as a useful tool in efforts to combat torture.

[76] Recommended by the United Nations Economic and Social Council (ECOSOC) in its resolution 1989/65 of 24 May 1989. In the first paragraph of this resolution, ECOSOC recommends that these Principles be taken into account and respected by Governments within the framework of their domestic laws and practices.

[77] Proclaimed by the United Nations General Assembly in its resolution 47/133 of 18 December 1992.

[78] Adopted by the United Nations General Assembly in its resolution 45/110 of 14 December 1990.

[79] Adopted by the First United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in Geneva in 1955, and approved by the Economic and Social Council of the United Nations through its resolutions 663 C (XXIV) of 31 July 1957 and 2076 (LXII) of 13 May 1977.

Basic Principles for the Treatment of Prisoners [80]	December 14, 1990
Body of Principles for the Protection of All Persons under Any Form of Detention or Imprisonment[81]	December 9, 1988
Model Agreement on the Transfer of Foreign Prisoners and Recommendations on the Treatment of Foreign Prisoners[82]	November 29, 1985
United Nations Standard Minimum Rules for the Administration of Juvenile Justice ("The Beijing Rules")[83]	November 29, 1985
United Nations Guidelines for the Prevention of Juvenile Delinquency (The Riyadh Guidelines)[84]	December 14, 1990
United Nations Rules for the Protection of Juveniles Deprived of their Liberty[85]	December 14, 1990
Guidelines for Action on Children in the Criminal Justice System[86]	July 21, 1997
Code of Conduct for law Enforcement Officials[87]	May 24, 1989
Basic Principles on the Use of Force of Firearms by Law Enforcement Officials[88]	August 27, 1990
Basic Principles on the Role of lawyers[89]	August 27, 1990
Basic Principles on the Independence of the Judiciary[90]	

(continued)

[80] Adopted and proclaimed by the General Assembly of the United Nations in its resolution 45/111 of 14 December 1990.

[81] Adopted by the United Nations General Assembly in its resolution 43/173 of 9 December 1988.

[82] Adopted by the Seventh United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in 1985, and endorsed by the General Assembly in its resolution 40/32 of 29 November 1985.

[83] Adopted by the General Assembly of the United Nations in its resolution 40/33 of 29 November 1985.

[84] Adopted and proclaimed by the General Assembly of the United Nations in its resolution 45/112 of 14 December 1990.

[85] Adopted by the United Nations General Assembly in its resolution 45/113 of 14 December 1990.

[86] Recommended by resolution 1997/30 of the Economic and Social Council of 21 July 1997 (in paragraph 1 of this resolution, the Economic and Social Council welcomed the Guidelines and invited all parties concerned to use them in implementing the juvenile justice provisions of the Convention on the Rights of the Child.

[87] Adopted by the Economic and Social Council of the United Nations in its resolution 1989/61 of 24 May 1989.

[88] Adopted by the Eighth United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in Havana, Cuba, from 27 August to 7 September 1990.

[89] Adopted by the Eighth United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in Havana, Cuba, from 27 August to 7 September 1990.

[90] Adopted by the Seventh United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in Milan from 26 August to 6 September 1985, and endorsed by United Nations General Assembly resolutions 40/32 of 29 November 1985 and 40/146 of 13 December 1985.

	August 26, 1985
Guidelines on the Role of Prosecutors[91]	August 27, 1990
Principles of Medical Ethics relevant to the Role of Health Personnel, particularly Physicians, in the Protection of Prisoners and Detainess against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment[92]	December 18, 1982
Declaration of Basic Principles of Justice for Victims of Crime and Abuse of Power[93]	November 29, 1985
Safeguards guaranteeing protection of the rights of those facing the death penalty[94]	May 25, 1984
Basic Principles and Guidelines on the Right to a Remedy and Reparation for Victims of Gross Violations of International Human Law and Serious Violations of International Humanitarian Law[95]	December 16, 2005
Optional Protocol to the Convention on the Rights of the Child on the involvement of children in armed conflict[96]	May 25, 2000
Optional Protocol to the Convention on the Rights of the Child on the sale of children, child prostitution and child pornography[97]	May 25, 2000
Optional Protocol to the Convention on the Rights of the Child on a communication procedure[98]	December 19, 2011

(b) International Regional Instruments

European Convention on Human Rights[99]	November 4, 1950
Protocol to the Convention for the Protection of Human Rights and Fundamental Freedoms[100]	March 20, 1952

(continued)

[91] Adopted by the Eighth United Nations Congress on the Prevention of Crime and the Treatment of Offenders, held in Havana, Cuba, from 27 August to 7 September 1990.

[92] Adopted by the General Assembly of the United Nations in its resolution 37/194 of 18 December 1982.

[93] Adopted by the United Nations General Assembly in its resolution 40/34 of 29 November 1985.

[94] Resolution 1989/64 of the Economic and Social Council (LXXII) of 24 May 1989.

[95] Adopted and proclaimed by the United Nations General Assembly in its resolution 60/147 of 16 December 2005.

[96] Adopted and opened for signature, ratification and accession by United Nations General Assembly resolution 54/263 of 25/05/2000.

[97] Adopted and opened for signature, ratification and accession by United Nations General Assembly resolution 54/263 of 25/05/2000.

[98] Adopted by UN General Assembly resolution 66/138 of 19/12/2011 and opened for signature in Geneva, Switzerland on 28/02/2012.

[99] Drawn up within the framework of the Council of Europe (an international organisation created in 1949), the Convention was adopted in Rome on 4 November 1950 and entered into force in the international order on 3 September 1953.

[100] Drawn up within the framework of the Council of Europe, it was adopted in Paris on 20 March 1952 and entered into force in the international order on 18 May 1954.

Framework Convention for the Protection of National Minorities[101]	February 1, 1995
European Charter for Regional or Minority Languages[102]	November 5, 1992
Council Directive 2000/43/EC of June 29, 2000 implementing the principle of equal treatment between people irrespective of racial or ethnic origin[103]	June 29, 2000
Resolution of the Council and the Representatives of the Governments of the Member States, meeting within the Council, of 29 May 1990 on the fight against racism and xenophobia[104]	May 29, 1990
Protocol No. 4 to the Convention for the Protection of Human Rights and Fundamental Freedoms, securing certain rights and freedoms other than those already included in the Convention and in the first Protocol thereto[105]	September 16, 1963
European Convention on the Adoption of Children[106]	April 24, 1967
European Convention on the Legal Status of Children Born out of Wedlock[107]	October 15, 1975
European Convention on Recognition and Enforcement of Decisions concerning Custody of Children and on Restoration of Custody of Children[108]	May 20, 1980
European Convention on the Exercise of Children's Rights[109]	January 25, 1996
European Convention on the Repatriation of Minors[110]	May 28, 1970
European Convention on the Legal Status of Migrant Workers[111]	November 24, 1977

(continued)

[101] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 1 February 1995 and entered into force at international level on 1 February 1998.

[102] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 5 November 1992 and entered into force at international level on 1 March 1998.

[103] Drawn up within the European Union and published in the Official Journal L 180, 19.7.2000, p. 22–26.

[104] Drawn up within the European Community/European Union and published in the Official Journal C 312 of 23/11/1995 p. 0001–0003.

[105] Drawn up within the framework of the Council of Europe, it was adopted in Paris on 20 March 1952 and entered into force at international level on 2 May 1968.

[106] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 24 April 1967 and entered into force at international level on 26 April 1968.

[107] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 15 October 1975 and entered into force at international level on 11 August 1978.

[108] Drawn up within the framework of the Council of Europe, it was adopted in Luxembourg on 20 May 1980 and entered into force at international level on 1 September 1983.

[109] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 25 January 1996 and entered into force at international level on 1 July 2000.

[110] Drafted within the framework of the Council of Europe, it was adopted in The Hague on 28 May 1970, entering into force at the international level on 28 July 2015.

[111] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 24 November 1977 and entered into force at international level on 1 May 1983.

European Agreement on Regulations governing the Movement of Persons between Member States of the Council of Europe[112]	December 13, 1957
Convention on the Participation of Foreigners in Public Life at Local Level[113]	February 5, 1992
Protocol No. 6 to the Convention for the Protection of Human Rights and Fundamental Freedoms, concerning the Abolition of the Death Penalty[114]	April 28, 1983
Protocol No. 7 to the Convention for the Protection of Human Rights and Fundamental Freedoms[115]	November 22, 1984
European Convention for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment[116]	November 26, 1987
Protocol No. 1 to the European Convention for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment[117]	November 4, 1993
Protocol No. 2 to the European Convention for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment[118]	November 4, 1993
Protocol No. 13 to the Convention for the Protection of Human Rights and Fundamental Freedoms, concerning the abolition of the death penalty in all circumstances[119]	May 3, 2002
Protocol No. 14 to the Convention for the Protection of Human Rights and Fundamental Freedoms, amending the control system of the Convention [120]	May 13, 2004
Additional Protocol to the Council of Europe Convention on the Prevention of Terrorism[121]	October 22, 2015

(continued)

[112] Drawn up within the framework of the Council of Europe, it was adopted in Paris on 13 December 1957 and entered into force at international level on 1 January 1958.

[113] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 5 February 1992 and entered into force at international level on 1 May 1997.

[114] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 28 April 1983 and entered into force at international level on 1 March 1985.

[115] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 22 November 1984 and entered into force at international level on 1 November 1988.

[116] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 26 November 1987 and entered into force at international level on 1 February 1989.

[117] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 4 November 1993 and entered into force at international level on 1 March 2002.

[118] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 4 November 1993 and entered into force at international level on 1 March 2002.

[119] Drafted within the framework of the Council of Europe, it was adopted in Vilnius on 3 May 2002 and entered into force at international level on 1 July 2003.

[120] Drawn up within the framework of the Council of Europe, it was adopted in Strasbourg on 13 May 2004 and entered into force in the international order on 1 June 2010. In the meantime, Protocols 15 and 16 amending the Convention for the Protection of Human Rights and Fundamental Freedoms have already been adopted. Adopted in Strasbourg on 24 June 2013 and 2 October 2013, entering into force in the international order on 24 June 2013 and 1 August 2018.

[121] Drafted within the framework of the Council of Europe it was adopted in Riga on 22 October 2015, entering into force in the international order on 1 July 2017.

Charter of Fundamental Rights of the European Union[122]	December 18, 2000
Council of Europe Convention on the Prevention of Terrorism[123]	May 16, 2005
Council of Europe Convention on Action against Trafficking in Human Beings[124]	May 16, 2005

It needs to be noted that we have not indicated all of the international instruments adopted, whether of universal and/or regional international character, and many others have been adopted over time and space. However, it is the plurality of these instruments that should lead us to wonder whether we need all of these legal instruments that have been adopted, whether of a universal international or regional international character. Aren't all rights enshrined in these international legal instruments the global rights of any citizen, regardless of the state? Is it not possible to standardize and/or globalize these rights in a single universal international legal instrument, of a binding character, or in other words, hard law? Human rights cannot and should not vary in geographic space, but can and should be perfected over time, consecrating and protecting new rights. Therefore, we believe that, in the 3rd millennium, that is, in the twenty-first century, the international community must perfect, consolidate, and improve all of the rights enshrined in these various instruments and approve a single binding international instrument of universal character, such as the Universal Convention on Human Rights.

3.6 Conclusion

The new challenge of the twenty-first century should be, without a doubt, the Globalisation of Human Rights for a Global Citizenship. In fact, as Acílio Estanqueiro Rocha argues, 'in this 21st century, the problem of human rights has a double topicality – theoretical and practical: theoretical, because the analysis of the problem has been towards the defence and expansion of such axiological principles to all humanity, and practical, because our era reveals a disturbing paradox: if, on the one hand, the implementation of these principles is sought, on the other hand, their violation is massive, even verifying a civilizational regression in several areas of the planet' (Rocha, 2018, p. 1). Similarly, António Teixeira Fernandes (2009) stated that '[everything] will depend on the state of society and on general opinion. Rights are, therefore, in evolution; they progress without ceasing, and it is not possible to mark a term which they must cross. What yesterday appeared to be no more than a kind of

[122] Drawn up within the European Union and published in Official Journal No C 202, 7.6.2016, pp. 389–405.

[123] Drawn up within the framework of the Council of Europe, it was adopted in Warsaw on 16 May 2005 and entered into force at international level on 1 June 2007.

[124] Drawn up within the framework of the Council of Europe, it was adopted in Warsaw on 16 May 2005 and entered into force at international level on 1 February 2008.

luxury will tomorrow become a strict right. The task that thus falls to the State [to make the International Community] therefore unlimited' (2009, p. 21). Consequently, today more than ever, scientific advances in various fields and globalisation have generated significant changes in the political, legal, and social sphere of global citizens, so that new and improved human rights are required for the dignity and defence of the human person and, in particular, for the collective rights of humanity, regardless of the geographical circumscription of the State in which we find ourselves. The challenge of the twenty-first century is to prepare future generations with a universal and binding international legal instrument, because only then will we have the global standards capable of safeguarding the citizen and man in all his fullness, regardless of his geographical circumscription.

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Chapter 4
Adult Studies as a Leisure Activity: From Exigency and Choice

Nitza Davidovitch, Ora Elkan, Hanna Gendel-Guterman, and Talma Kushnir

Abstract The research literature on adult leisure devotes very little attention to studying as a leisure activity, although studying has become one of the most common and popular leisure activities. With the passage of time, adult studies have undergone a transformation from a compulsory activity to extra-curricular classes, clubs of interest groups, as a legitimate leisure activity, one that is beyond the classical school-based time and place and that constitutes a voluntary and pleasurable activity. The current research refers to Torah study in its wide meaning, including all traditional Jewish texts that are constitutive texts of the Jewish culture. The research literature on leisure indicates that the forms of leisure activity utilized depend on the learners' sociodemographic background and hence also on the life patterns to which they have become habituated, according to the continuity theory and the serious leisure perspective. The first research purpose was to examine sociodemographic differences in gender, age, religiosity, marital status, level of education, and socio-economic status, among 234 respondents with a diverse sociodemographic background, between 106 Torah learners as a leisure activity and 128 respondents who chose to study other enrichment courses as part of their leisure activity. Another purpose was to compare the perception of learners in both groups regarding the efforts invested in their studies and their significance, and regarding the benefits of studies: satisfaction and contribution to the learners. The research findings show that the respondents who chose Torah study as a leisure activity were mainly men, religious, and married. In contrast, the respondents who chose non-Torah enrichment studies as a leisure activity (the control group) were mainly women, non-religious, and included many more individuals. Participants in

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both study groups have in common being highly educated, with a good socio economic status and approaching or after retirement from work. In addition, among the Torah students the degree of efforts invested and the perceived significance of studies on one hand and the benefits attributed to studies on the other (satisfaction and contribution of studies) were higher than among those who engaged in enrichment courses. Namely, Torah students both invested more efforts but also reaped more benefits from their leisure activity than those engaged in enrichment studies. This is a pioneer study of Torah study as a leisure activity that has undergone an essential transformation from its perception as an obligation, to an activity involving choice and willingness, yet one that is not perceived as leisure by young people who see studies as mandatory. This research can lead to further studies that will examine the change in the perception of studies as a leisure activity, irrespective of the contents studied, in a society where studying continues throughout life in all ages and degrees of religiosity. Studying in general has the potential to offer equal opportunities, irrespective of one's socioeconomic status. The study sought to explore the world of older adults who choose to study and to illuminate aspects that have not received much attention in the professional literature. The current research findings might have applied implications capable of contributing significantly to society as a whole.

Keywords Adult studies · Continuity theory · Education · Jewish culture · Jewish texts leisure activity · Motivation · Socio-economic status · Torah study

4.1 Adult Studies as a Leisure Activity: Introduction

This study focuses on the perception of studies in general and Torah study in particular as factors shaping leisure culture. The study examines sociodemographic differences in gender, age, religiosity, marital status, level of education, and financial status, among Torah students as a leisure activity and those studying other enrichment courses. The study explores the association between input related to the choice of studies as a leisure activity, namely, the degree of effort invested in studies and the evaluation of their significance, and the output: satisfaction with studies and their perceived contribution to learners from diverse sociodemographic backgrounds. One's choices regarding leisure activity are affected by the life patterns to which people have become habituated, according to the continuity theory and the serious leisure perspective. The context of the study is the shift in the perception of studies in general and Torah study in particular, from a mandatory activity and a sacred religious activity to the choice of studies as part of learners' culture and social identity in their spare time; a shift to viewing enrichment courses as part of world culture and general knowledge. In the current context Torah study is not only an obligatory activity part of the worship of God, but rather also a leisure activity that involves choice, one that is diverse and that takes place beyond the obligatory time spent in prayer sites and study halls, which are considered sacred locations.

Various researchers formulated different definitions of leisure: as time, as an activity, as a conscious state of mind, and as a value. Furthermore, researchers addressed the perception of leisure in traditional-religious society versus the attitude to leisure in modern society (Soen & Rabinovich, 2011). Leisure activities are characterized by choice (Dumazedier, 1967) rather than commitment. They are also characterized by pleasure and reflect one's personal motivations. Israel is defined as a culturally developed country (Csikszentmihalyi & LeFevre, 1989; Delle Fave & Massimini, 1988). This is manifested in a wide variety of leisure activities that constitute a resource contributing to quality of life. Passmore and French show that engaging in studies as a leisure activity is an opportunity to acquire knowledge and skills, as well as for personal growth and self-efficacy. In Israel, in the last decade, accelerated developments are evident regarding leisure activities in diverse populations. A wide range of many different and unique leisure activities are available. Among these activities, studies in general and Torah study in particular have become activities performed voluntarily and for pleasure (Azulay, 2010; Ben-David, 2016; Sheleg, 2010).

The number of retirees in the world as a whole is increasing. This demographic trend is also evident in Israel, where life expectancy at present is among the highest in the world. In light of the outlook whereby quality of life in older age is shaped by one's behavior, it is recognized that people have many opportunities to take responsibility, contribute to their own quality of life, and maintain their independence by choosing their activities in older age. Retirees have many years to contribute to society. This is particularly true of the younger old, the 60–69 age group, who often continue to maintain an active life style as in the past. Studies on aging recognize the significance of activities outside the home, which help maintain an active life and contribute to the health of older adults and their continued involvement in community life. This conception sees older age as a time of continued action and involvement manifested, among other things, in active citizenship and participation in extra-curricular activities and volunteer work.

The concept of leisure in older age evolved in the modern western world, where older adults were perceived in the past as respected members of the family who cared for their grandchildren when reaching the stage at which it was hard for them to continue performing physical work. At present, seniors are left with much spare time that can be utilized for personal purposes, depending on income, health status, and cultural background. Such attributes affect the person's personal preferences, reflect one's identity, and contribute to one's physical health and satisfaction with life.

According to the continuity theory and the serious leisure perspective, one's leisure patterns depend on learners' sociodemographic background and hence also on the life patterns to which they have become habituated. Hence, the first purpose of the current study is to examine the sociodemographic characteristics of gender, age, religiosity, marital status, level of education, and financial status among respondents who chose to study as a leisure activity. The research sample will include, on one hand, students of Torah in its wide sense, including traditional Jewish texts that are the constitutive texts of Jewish culture, versus people who chose to study other enrichment courses as part of their leisure activity.

Another aspect of the study is exploring the effect of one's choice of study subject (Torah study versus enrichment studies) on associations between several socio-demographic characteristics of the learners and their subjective perception of the efforts invested in studies and their perceived significance as gauged by satisfaction with the studies and their contribution.

4.2 Literature Review – Leisure Culture and Studying – Are They Compatible?

4.2.1 Leisure as a Resource

Leisure is gradually occupying a prominent place in human life (Hayosh et al., 2020). Many researchers refer to leisure as a significant resource in one's life (Davidovitch & Soen, 2016; Pronovost, 1998; Roberts, 2010). The attitude to leisure as a resource is evident in the choices people make regarding the activities in their spare time, activities which are dear and meaningful (Hayosh, 2018). Culture affects the customary type of leisure in one's society (Weber, 2010). In Israeli society, leisure is receiving growing legitimization. During Israel's more than 70 years of existence, a change is evident, from a society that sanctifies labor – to a society that sanctifies leisure as a value (Davidovitch & Soen, 2016). The exigencies of life have changed, and the new generation has been raised into a reality of affluence. This is true of other cultures where labor is perceived as a means of reaching the goal – which is leisure (van der Poel, 2006). Hence, leisure is culture-dependent, as manifested mainly in the amount of time devoted to leisure and the type and level of activity (Katz et al., 2000; Soen & Rabinovich, 2011). Where in the past studies found that Israelis work long hours, it is now evident that Israelis are investing as much time in work and leisure (Brandman Institute, 2002). Israel is defined as a culturally developed country (Csikszentmihalyi & LeFevre, 1989; Delle Fave & Massimini, 1988). This is evident in a wide variety of leisure activities that constitute a resource for improving quality of life.

4.3 Continuity Theory

One theory that is strongly related to managing leisure in older age is the continuity theory, formed in 1989 and concerns the processes of adjustment to older age based on past experiences. Atchley, who developed the theory, suggests that people cope with change by means of social and cultural techniques they learn and develop throughout life. Hence, preservation of past activities and roles can help them adapt and adjust to older age and the changes it entails (such as a surplus of spare time).

Aging involves many changes and transitions. Retirement affects time management and coping in daily life, as well as one's priorities. Accordingly, the theory contends that rather than changing in old age, people seek continuity by linking things in the past with changes in the future. Theyshow a level of involvement in the present that is similar to previous patterns in order to protect and preserve their self-concept over time. The past is perceived as a resource that contains information regarding ways of coping with changes in old age. Although continuity over time does not necessarily lead to successful aging, older people who adapt to changes in old age from a consistent self-perception, will experience such aging. A distinction should be made between internal continuity and external continuity: The first is based on one's personality and suggests that every person has an array of feelings and experiences that reflects an emotional capacity to cope, also based on personality. Hence, an older person with high emotional capacity will be capable of using a variety of psychological resources in order to cope with various events in old age. External continuity is manifested in the physical and social environment, as well as one's social role and activity. At a time of many internal and external changes, external continuity is usually a means utilized by the aging person to maintain internal continuity, as it provides the individual with security and helps cope with changing life circumstances. Hence, continuity is not presented in the theory as contrary to change, rather as a strategy for coping with change.

It must be remembered that for older individuals the process of managing leisure time involves continuity and change concurrently. Although retirement is often considered a time of leisure, it appears that very few people effect a radical change in their leisure activities when retiring. The tendency to continuity in leisure actions is characterized by the inclination of older adults to continue engaging in the same leisure activities as before their retirement or to resume activities in which they showed high interest and ability in the past.

4.4 The Choice to Study as a Serious Leisure Activity

Leisure activity is characterized by choice rather than commitment. In addition, it is characterized by pleasure and reflects one's personal motivations. Of the wide possible range of leisure activities, we will focus on studying, be it enrichment studies or Torah study as a leisure activity. Previous research indicates that engaging in studying as a leisure activity is an opportunity to learn and to acquire knowledge and skills, as well to facilitate personal growth and self-efficacy. It has also been suggested that leisure activities are essential for promoting health and improving quality of life. The association between leisure activities and quality of life has been studied for years. All the studies on the benefits of leisure found a positive association between participation in leisure activities and quality of life (Grant & Kluge, 2012; Heintzman & Patriquin, 2012). In addition, leisure activities were found to enhance one's self- esteem and to reduce the impact of negative life events (self-protection (Kleiber et al., 2002). These findings indicate leisure and studying as a setting for acquiring resources that promotes quality of life.

Serious leisure is defined as a continuous regular activity that grants one meaning and expresses one's abilities (Dahan & Nimrod, 2014). Additionally, study activities were found to be associated with brain vitality, as well as life expectancy. Accordingly, there is a need to develop settings that facilitate and encourage activities of learning and leisure, which will facilitate an improvement in quality of life and mental health among the aging population.

Leisure is defined as activities engaged in willingly and voluntarily, which generate pleasure and grant meaning challenging activity that is adapted to the individual and expected to increase concentration and attention as well as offer feedback (Dahan & Nimrod, 2014). According to Mashiach et al. in order for a certain activity to fit the definition of a leisure activity it must meet several conditions:

1. It must provide a match between challenges and skills in order to prevent boredom resulting from an overly easy challenge or frustration at a difficult challenge that might lead to anxiety. This match is particularly important in leisure programs that encourage learning.
2. The activity must have goals that grant it meaning in and of itself, and it is necessary to add immediate feedback regarding these goals in order to direct the activity to attaining goals and avoiding distractors.

   The activity must intensify focus and attention that prevent intrusive preoccupations and ruminations.

Leisure activities can be divided into several types according to the customary division in the research on aging: social activities, physical activities, productive activities, mental activities, and inactive activities. A negative correlation was found between engaging in mental, social, and productive leisure activities and the risk of dementia, namely, the more extensive one's engagement in these activities the less the risk of dementia. Accordingly, a study conducted by Glass et al. among seniors in the US found that engaging in any of the different leisure activities aside from inactive activities significantly reduced the rate of mortality, such that a correlation was found between engaging in them at a higher frequency and a lower mortality rate. In addition, engaging in social and productive activities has the same positive effect as engaging in physical activities. Notably, independent choice of the type of leisure activity engaged in allows seniors to enjoy greater sense of meaning as a result of the activity, thus increasing the levels of life satisfaction.

Dahan and Nimrod (2014) note that among retirees living in Israel the field of leisure engaged in most frequently is consuming "old media" – newspapers, television, and radio, considered passive activities - while the field of leisure engaged in least frequently is social activities. Physical activity is characterized by a considerable dichotomy because many retirees engage in this field at a high frequency but a considerable proportion do not engage in physical activities at all. Finally, volunteer activities are engaged in at a lower frequency than other types of leisure activities. Some 11–14% of seniors engage in these activities at a moderate to high frequency.

What are the obstacles preventing people from participating in activities? It is evident that many seniors engage in activities that do not contribute to their physical and mental health (inactive activities) at a high frequency, and a low proportion engage in leisure activities that have a positive contribution, despite the finding that most seniors are interested in engaging more in activities that benefit physical and mental wellbeing (Dahan & Nimrod, 2014).

Skoufalos et al. (2017) lists several barriers to participation in leisure activities:

1. **Attitudes**, since many seniors adhere to a work ethics approach whereby leisure activities are redundant and less important than work and have a negative approach to aging processes that impair motivation and readiness to engage in these activities.
2. **External or circumstantial barriers** such as lack of time due to concern for others. Lack of transportation, a low level of education, and socioeconomic difficulties are also significant barriers to participating in leisure activities.
3. **Lack of appropriate programs and infrastructure.**
4. **Lack of common awareness of existing opportunities.**
5. **Sense of defenselessness and fear** of injury among the senior population.
6. **Living in peripheral areas**. This is an even graver problem. Peripheral areas are defined as areas geographically distant from metropolitan areas, and particularly from the center of the country. Therefore, seniors living in these areas are at a disadvantage regarding the availability of mental and physical services, resources, and social activities (Skoufalos et al., 2017).

Studies conducted in the US showed a higher prevalence of chronic illness and disabilities, as well as a lower prevalence of health behaviors and a lower life expectancy among aging communities in rural areas. Moreover, these communities are challenged in other dimensions such as: a lower socioeconomic status than among urban populations, a need to travel greater distances to fulfill basic needs such as quality health care, prescription medicines and healthy food, difficulties in forming social and community relationships due to distance problems and difficulties moving around, the migration of many young people to urban areas that leads to a reduced quantity of potential caregivers, reduced employment options, and a low supply of healthcare services, transportation, and leisure (Skoufalos et al., 2017).

A review of the existing programs and models in recent years shows that countries worldwide and Israel in particular, are dealing with demographic changes in their population, including the aging of the population as a result of a drop in birth rates, the migration of young people, and the growing life expectancy of seniors. A huge amount of resources is invested every year in conducting studies, developing innovative projects and initiatives, raising money, and developing models with the aim of coping with these changes and easing the life of seniors around the world. A preliminary study shows the great significance of finding solutions that combine collaborations between the public, business, and non-profit sectors (non-governmental organizations), in the recognition that such collaboration will lead to good, varied, and more efficient solutions. Therefore, for the purpose of this review examples were gathered of models and programs of tri-sector collaboration in

programs focusing on reducing loneliness and alienation, granting financial assistance, leisure and culture activities, mental activities, productive activities, and transportation for senior citizens in distant and peripheral areas.

In general, most of the models in the literature were models initiated by Third Sector and non-profit sector associations, volunteer organizations, or collaborations between the non-profit sector and the public sector. Very little initiatives of the business sector were found and in most of the cases these initiatives were externally motivated. Accordingly, as can be seen, many organizations from the public sector and non-profit sector focus on raising awareness of senior citizens and encouraging the development of initiatives and projects in the business sector through competitions and tenders as well as by offering competitive grants, publicity, or other incentives. Finally, another trend evident in most of the programs reviewed particularly in the non-profit and public sector, beyond direct activities aimed at improving the state of seniors in the periphery, is massive investment in indirect activities of fundraising and funding research in this field.

The serious leisure perspective was developed in the extensive work of Robert Stebbins over the past 40 years. According to Stebbins, serious leisure requires involvement, concentration, and resources, which include considerable physical or mental effort, time, and money, and which similar to work can provide considerable interest in life. This form of leisure includes six characteristics that define participants' leisure experience. The six features are:

A. Perseverance – the need to persevere at the activity.
B. A need to put in effort to gain skill and knowledge – acquiring knowledge, tools, and skills to be able to participate in the activity.
C. Availability of a leisure career – a result of achievements or of deep involvement in the activity.
D. Realization of various special benefits - derived from participation in serious leisure and connected to personal aspects (self-enrichment, self-realization, improving the self- image) and social aspects (affiliation with similar colleagues).
E. An attractive personal and social identity - strong identification with the activity and pride at the achievements attained through it.
F. Developing a unique ethos and social world – manifested in belonging to the social world of the individual's leisure occupation.

Many studies have been conducted worldwide to examine the possible association between different types of leisure activities and the characteristic of serious leisure. These studies examined, for instance, the presence of the six characteristics mentioned above, while others addressed the rewards gained from leisure activities. Stebbins discerned two other types of leisure that contain only some of the six features of serious leisure, which he calls "casual leisure" and "project-based leisure".

Casual leisure is defined as short-term activities that cause participants significant immediate pleasure. These activities have a significant hedonistic component and when participants experience a sense of refreshment and an opportunity to

escape the pressures and burdens of daily life. There is a certain sense of relief, but not in its deep meaning – that of happiness. This type of leisure does not include all six features mentioned above as characteristic of serious leisure, therefore such activities do not involve expectation of significant learning or of developing a deep sense of commitment.

Stebbins, who sought to use casual leisure to explain serious leisure, which he compared to work, claimed that casual leisure does not contribute to a full and satisfying life, Lacking in meaningful involvement casual leisure might also cause boredom and disquiet, so it might be risky. Therefore, it is not surprising that casual leisure often has a negative image and is considered as inferior.

Project-based leisure includes features of both serious leisure and casual leisure. On one hand, it is a short-term activity that takes place in one's spare time, but it is not immediate or short-term, rather begins and ends in a certain defined period. Activity characteristic of this type of leisure is based on taking responsibility for a project, for instance planning, organizing, and carrying out a hike, organizing a significant event, and it requires skills and knowledge. The activity will probably not include developing a unique ethos or professional course, particularly since it is limited and ends after a while.

Varied perceptions of leisure can be found among different populations. Myriad leisure activities can be found that attract young people and tempt them to move rapidly from place to place, from activity to activity, from thought to thought, and from one experience to the other. Young people tend to constantly skip between various stimuli, unable to stop and process the experiences.

4.5 The Leisure Paradox

Despite their heterogeneity, older adults in Israel have several common value-based characteristics that impact their leisure patterns as well as their attitude to leisure (Hayosh, 2018):

1. **The centrality of the family.** Older adults in Israel attribute a great deal of significance to the family, irrespective of their ethnic background, and tend to be highly involved with family members.
2. **A strong work ethics and a weak perception of leisure.** Despite the different cultural ideologies of seniors, most seem to share a positive perception of work and a negative perception of leisure. Among veteran Jewish Israelis, for instance, this stems from the centrality of work in the national ethos. Among religious Jews, leisure is considered a waste of time that should have been devoted to Torah study and to doing good deeds.
3. **A lack of models for successful leisure activity after retiring.** Many older adults in Israel, particularly those who immigrated to the country at a young age, lack retirement models.

4. **A sense of continuous physical and financial insecurity.** Israeli reality is characterized by a continuous sense of insecurity that occupies a central place in the life of most Israeli citizens, and particularly in the life of older adults. Insecurity might minimize the level of significance and engagement in leisure and affect the leisure patterns of older adults. These common features, along with the heterogeneity of Israel's aging adults, complicates the process of planning leisure policy and services for this population.

Notably, due to these unique features it is not possible to utilize insights from studies conducted in other countries to explore the situation in Israel and there is a need for deep knowledge of how seniors in Israel engage in leisure and experience it.

4.6 Adult Studying and Education

Studies conducted among older adults found that engagement in leisure activities in general and studying in particular has a positive impact on preventing or reducing the risk of dementia and other illnesses. Wonderful results have been reported concerning older adults participating in courses and workshops that expose them to new knowledge, enhance thinking and memory and teach relevant tools and skills for the new era (Dahan & Nimrod, 2014). Acquiring an education at an older age has its benefits. First, the knowledge that what one learns today might disappear tomorrow motivates older adults to educate themselves and acquire knowledge so long as their memory is still fully intact. Second, learning new contents based on one's existing wealth of knowledge utilizes the experience and skills acquired in the past and allows a sense of meaning and interaction with the future generation. Third, social benefits occur when one meets other learners of a similar age and form friendships based on common interests. Moreover, learners are exposed to new domains and topics and thus find common topics for discussion with the young generations or with their peers.

Since there is no age limitation to learning, seniors can choose the subjects, the pace of studies, and the study group – classmates of their age with the same fields of interest. They can choose general enrichment studies, universal studies, and/or Jewish culture studies. Torah study is distinguished from other theoretical studies as it entails learning very ancient and sacred texts that were learned, taught, interpreted, and expounded on by many sages for generations. Over the years, these texts also became texts learned and expounded on for generations by other commentators, such that those learning them encounter various interpretations produced over the generations based on different knowledge, thoughts, feelings, opinions, and associations connected to the culture and to one's personality, society, and times. Those learning these texts can interpret them based on their own understanding, which is more extensive due to their encounter with both the original text and with texts of commentators and sages in the past and present, such that they

come into contact with a wide range of interpretations, different points of view, and diverse angles from different cultures, different times. Thus the learner creates another unique interpretation that is an additional and new foundation for other learners and teachers to come.

Studies show that the population of Torah students in Israel has changed and diversified in recent decades. One of the developments indicating the change in the population of leisure learners is that, in addition to men, women too are studying Torah. In recent years this topic has been the focus of several studies (Elor, 1998; Brown (Hoizman), 1996; Bar-El, 2009; Halivni, 1997; Feuchtwanger, 2011). Moreover, a change is evident in the motivation underlying studying (Ben-David, 2016; Sheleg, 2010). At present, not only religious people study Torah as a religious precept, but rather a wider and more diverse public is studying Torah by choice as a leisure activity that combines interest, pleasure, inspiration, uplifting, and enrichment (Bar-Lev & Spector, 1995; Davidovitch & Soen, 2016). Studies show that the groups are diverse and characterized by a different "profile" of learners than in the past (Azulay, 2010; Ben-David, 2016; Sheleg, 2010). The "new" groups constitute a diverse sociocultural cross-section (Bhabha, 2002).

It is said that since the murder of Prime Minister Rabin, due to the fracturing and trauma experienced by Israeli society, a "revolution of Jewish renewal" is occurring (Bhabha, 2002; Sheleg, 2010), one that intersects sectors and genders, embracing traditional and other contents and study methods. This Jewish renewal (Ben-David, 2016; Sheleg, 2010) is manifested among other things in the domain of Torah study, with a different time and place, teachers and students, nature of discourse and study methods. This renewal encompasses a breach of the stigma whereupon studies necessarily take place in a yeshiva (Shenhav, 2001). The change is evident in the establishment of pluralist batei midrash (study centers) where Torah is learned as a leisure activity, such as Elul, Kolot, Alma, Bina, and an umbrella organization called Panim, which unites 60 organizations engaged in studying Jewish Israeli culture. These study centers gather together students from a wide social range. From students in secular yeshivas in Tel Aviv and Jerusalem, the circle of students has grown to include Nahal groups and study groups abroad (Ben-David, 2016; Sheleg, 2010). The shared studies are part of dynamic identity processes taking place in Israel (Sheleg, 2010) and are challenging the traditional division into sectors (Shenhav, 2001) and particularly the dichotomous "religious/secular" distinction (Ben-David, 2016; Sheleg, 2010).

Leibowitz referred to this when he said: "Distancing the study of Torah from women is the denial of a basic right, her 'Jewishness' becomes inferior to that of men... this situation is unbearable..." (Leibowitz, 1982). Women's entrance into the world of Torah study reflects a lengthy process of development and socialization, where women are entering areas previously characterized by a distinctly male majority, from which they had been barred (Blum-Kulka et al., 2008; Teomim-Ben Menachem, 2013).

4.6.1 The Contents Studied

Torah study deals mainly with universal contents that relate to the attitude to others. The following are several examples of the universal perception of others. The philosopher Levinas (1981) prioritized the issue of the Other and addressed one's responsibility towards the other person. Levinas' philosophy is linked to his intensive interpretation of the Talmud and scriptures (Epstein, 2001) and to having been a victim of the Holocaust. In his book "Totality and Infinity" he examines what could have allowed an enormous ethical failure such as World War II and, on the other hand, what could have prevented the evil or the indifference towards it (Levinas, 1971). He claims that in order to allow the world to exist each person should take responsibility for the Other and do good unto him (Epstein, 2001).

In Buddhist thinking as well, seeing the other is presented as a basic value of relationships. It emphasizes compassion for the other and love as an act of attachment (Burstein & Lahav, 2010). The Dalai Lama says "In many cases your love and compassion for your friends are an act of attachment" (The Dalai Lama and Cutler, 1998). In Christianity as well, "Love your neighbor as yourself" constitutes a foundation of the theory of ethics. In the New Testament, this verse appears several times and is portrayed as second only to Love your God (Matthew 19).

R. Nachman of Breslov also relates to one's commitment to the other. He interprets the rabbinical statement "Therefore, each and every person is obligated to say: The world was created for me" (Sanhedrin 37a) as a saying that obliges one to constantly engage in correcting (mending) the world, as it is mine (Likutey Moharan, 5).

4.6.2 Motivation in Torah Studies

The motivation to study Torah as a leisure activity is another manifestation of the shift that is occurring among Torah students (Ben-David, 2016; Goodman, 2017; Sheleg, 2010). The "new learners" study Torah due to their desire, interest, free choice, and intrinsic motivation, with no external pressures or constraints. The Theory of Self-Determination distinguishes between different types of motivation by the reasons or aims that stimulate action. The basic distinction is between intrinsic motivation, which relates to the interest or enjoyment derived from the activity itself (Assor, 1999), and extrinsic motivation, which relates to motives that are not connected to the activity itself, rather stem from a need or effort to achieve a certain result, distinct from the activity per se (Assor, 1996). It may be assumed that the motivation to study Torah in one's leisure time is related both to studying contents that arise from the encounter and to the psychosocial benefits that accompany learning with other people (Bhabha, 2002; Sheleg, 2010).

Learning contents related to attitudes, responsibility, and support of others, might constitute a means of building/expanding a significant pool of resources for the learner (Grant & Kluge, 2012; Heintzman & Patriquin, 2012).

4.6.3 Leisure Activities and Demographic Variables

The topic of participation in leisure activities and their impact on quality of life has been studied to date with regard to two age groups: adolescents and older adults (older than 60). The forms of leisure activity in older ages are affected by the following factors: gender, country of origin, education, socio-economic status in the past and present, marital status, and residential arrangements, where each of these variables as well as their combination can affect the choice of leisure activity (McPherson, 1991). It is also evident that the findings on the leisure activities of older adults by demographic background variables are not uniform and depend on the culture in the countries studied (Roberts, 2010).

There is relatively more research on gender differences in leisure activity among older learners. For instance, a study conducted in Hong Kong found that older married men who live in urban areas participate more in leisure activities than single women in urban areas (Li et al., 2010). A study conducted in Malaysia also found that elderly women are less inclined than men to participate in leisure activities, aside from among the very old (Sharifah & Tengku, 2007). Bureš et al. (2016) found that women's participation in leisure activities had a much greater effect on their quality of life than among men. Studies conducted in western countries have shown a reduction of the gap between the leisure activities of men and women except two essential differences. Men tended to separate their work life and leisure activities, while women identified leisure as a specific reference setting that includes certain individuals. Secondly men evaluated the extent of their leisure activity by the time they devoted to it, while women evaluated the quality of the leisure activity (Roberts, 2010).

Marital status was also found to have an effect, and having a spouse was found to encourage the participation of older adults in leisure activities (Satariano et al., 2002). With regard to the effect of age, there are few findings, because the age range of older adults is not wide to begin with. As expected, the continuous effect of aging on older adults was found to result in a relative drop in the extent of their leisure activities (Van Der Pas & Koopman-Boyden, 2009). Also, socioeconomic status affected participation in leisure activities, which was higher among those with a higher education (Satariano et al., 2002; Tae, 2007; Bureš et al., 2016) and also among those with a high income (Van Der Pas & Koopman-Boyden, 2009). Other influential variables in this area are religious beliefs and education (Li et al., 2010).

4.6.4 Demographic Variables and Their Impact on Leisure Activities in Israel

According to a report on the leisure patterns of seniors in Israel (2014), their rate of participation in enrichment programs, studies, and extra-curricular activities was about 34%. These activities were ranked relatively low of all leisure activities, but it is notable that 14% engage in them at a medium frequency and 11.5% at a high frequency. The variable that most influences on participation was level of education and level of income, similar to research findings from different countries around the world. A publication by Brookdale (2018), which includes data for the years 2015–2017, showed findings regarding gender differences in enrichment activities: The data indicate that in the 65–74 age group 19.3% of the men participated in extra-curricular activities, compared to 28.7% of the women. The disparity between women and men diminished in ages 75+, but still 21.7% of the women continued to participate in extra-curricular activities, compared to 17.9% of the men.

The distribution of types of extra-curricular activities shows that 24.6% of the men participated in Torah, Jewish studies, and religious classes, versus only 14.9% of women. In comparison, 28.3% of the women participated in arts, compared to some 10% of the men. Sports classes were attended by 48% of the men and some 60% of the women. These data show a discrepancy in the rate of leisure activities between older women and men, where older women have a higher rate of participation, and a greater discrepancy in the types of activity selected by each gender. One possible explanation for the higher participation of women is the findings among those aged 65+, where 23.1% of the men reported feelings of loneliness compared to 38.5% of the women.

The current study, for which data were collected recently, examines the sociodemographic differences in gender, age, religiosity, marital status, education, and financial status, among respondents with a varied sociodemographic background who chose to study either Torah as a leisure activity or other enrichment courses. The study explores the association between the study topic chosen as a leisure activity and the learners' subjective perception of the features of studying (the effort invested in studies and the significance of studies), as well as the benefits accrued: satisfaction with studies and their contribution to the learners. The research findings might serve to reinforce the continuity theory and the serious leisure perspective.

The study included 234 male and female respondents divided into two groups: a group of Torah students (some of whom were studying in a *hevruta* (collaborative) format, and some face-to-face by participating in lectures), and a control group consisting of respondents who were studying a theoretical topic face-to-face by participating in lectures. The respondents who were studying enrichment courses did so in a course run by the **Brookdale Institute** at Bar-Ilan University, which is the leading institute for applied social studies in Israel. The Brookdale program, sponsored by the president of the university, has existed for about four decades and

attracts thousands of students from all over the country. Students enjoy lectures on innovative topics from the best lecturers on an attractive green campus in central Israel. Enrichment courses studied by the control group were on the history of the arts and the interrelations between the arts.

Respondents who were studying Torah-related subjects did so under **"Kolot"**, which is a non-profit organization that operates to create an ethical society by encounters between senior Israeli leadership and "beit midrash" type studies. The organization operates study groups for influential figures in Israeli society and accompanies high ranking officials in a personal process, as well as the staff of organizations, communities, and projects. The "beit midrash" addresses mainly the possible contribution of Judaism to dealing with major ethical and social challenges in Israeli society and in the Jewish people at present. Among the members of the beit midrash are "Kolot" facilitators who come from a wide range of identities in Israeli society and are leading teachers in current-day pluralist batei midrash. These include orthodox, conservative, and reform male and female rabbis, people who engage in Jewish studies on a cultural basis, academics, social activists, authors of philosophical texts, people from the center and periphery of the country, and others. This is one of the only batei midrash in Israel where representatives of the three current major religious streams of Judaism, as well as of traditional and secular Judaism, study and create together.

4.7 Studying as a Form of Leisure Activity

4.7.1 Purpose of the Study

To compare the sociodemographic profiles and features of studying among two groups of older learners: Torah students and those studying another subject as a leisure activity. Figure 4.1 presents the research model.

Research Questions

1. Is there a difference between those who choose Torah study and those who choose general enrichment studies in the sociodemographic variables of gender, religiosity, marital status, years of education, financial status, and age?
2. To what degree do sociodemographic background factors impact the subjective perception of efforts invested in studies, the significance of studies, satisfaction with them, and the perceived contribution of studies among those engaged in studying as a leisure activity, whether studying Torah or studying general enrichment courses?

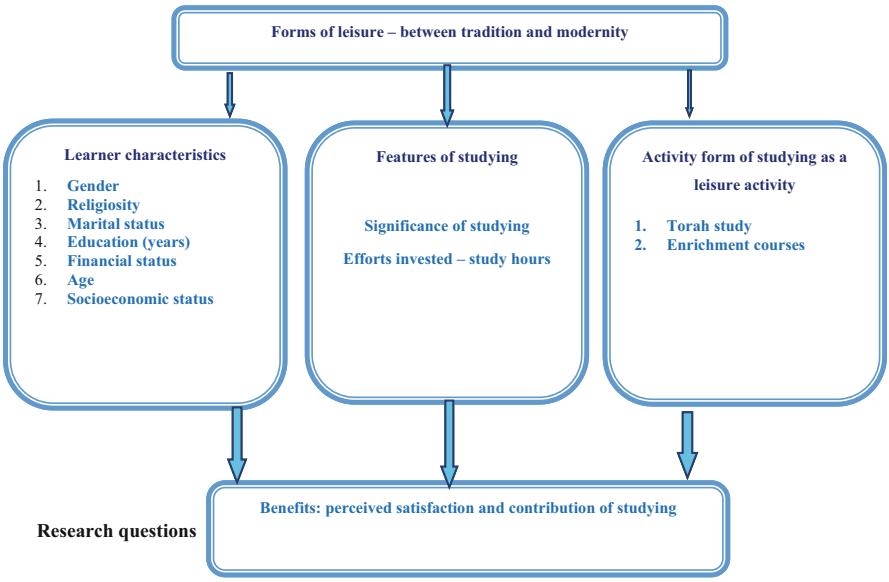

Fig. 4.1 The research model

4.8 Method

4.8.1 Research Population and Sample

The research population was defined as older adult urban residents of central Israel who study regularly in their leisure time. The sample was obtained by stratified sampling that produced adequate representation of two separate groups: older adults who study Torah (including Bible and Talmud) and older adults who study non-Torah enrichment courses. The sample consisted of 234 respondents, including 106 (45.3%) Torah students in the *hevruta* form or face-to-face and 128 (54.7%) students of face-to-face enrichment courses via participation in lectures. Of all the participants, 42.3% were men and 57.7% women. The age range was 18–87, with a mean age of 58. Nevertheless, 87% were older than 40. Regarding education, 21% had 12 years of schooling or less and 79% had a tertiary education (13 years of schooling or more). With regard to religiosity, the sample included 49.6% secular, 18% traditional, and 32.4% religious/ultra-orthodox participants.

4.8.2 Research Procedure

The study received the approval of the institutional ethics committee at Ariel University. The administration of the questionnaires took place during 2019–2020.

The sample included two groups of learners, students of various theoretical disciplines in the Brookdale program and students in Kolot, which operates Torah study groups in Israel. Most of the questionnaires were distributed in class, but since the distribution took place partially during Covid-19, when studies were interrupted, some of the questionnaires were sent by e-mail or administered to participants by telephone. In total, 350 learners were contacted. Seventy-three respondents agreed to participate but did not complete the questionnaire and 43 questionnaires were not completed in full and were therefore not included in the sample. Hence, the sample consisted of 234 participants (a response rate of 67%).

4.8.3 Research Tools

Three research tools were used: a demographic questionnaire, a questionnaire on the type and manner of studies, and a questionnaire on the effort invested (evaluation of significance and extent of efforts invested by hours) and the perceived benefit of studies (contribution of studies and satisfaction with them).

1. *Demographic questionnaire* – This questionnaire was constructed by the current researchers. The questionnaire includes several indicators that relate to various personal characteristics of the respondents. All the personal characteristics were defined as categorical variables: gender, religiosity, marital status, education (years of schooling), socio-economic status, and age.
2. *Questionnaire on type and manner of studies* – This questionnaire was constructed by the current researchers. It includes questions on the topic studied in one's leisure time, the place of studies, the weekly number of hours and the number of years devoted to studying the topic, meeting with other students outside class hours, and the manner of studies (*hevruta*, face-to-face).
3. *Questionnaire on the perception of efforts invested and benefits of studies* – Participants were asked to rank their replies to four questions on five-point scales, rating the extent of efforts invested in studying the specific topic, the significance of studies, the satisfaction with studies, and the contribution of studies.

4.9 Results

The first research question related to the gender-based difference between those who chose Torah study and those who chose general enrichment studies. Table 4.1 presents the distribution of the learners by topic of study and gender.

An χ^2 analysis of the distribution showed a significant association between gender and study topic ($\chi^{2(1)} = 44.70, p = .000$). Among the group of Torah students there was an absolute majority of men, while among the enrichment students there was an absolute majority of women.

Table 4.1 Distribution of learners by topic of study and gender (percentage)

Torah study N-106	Men	66.0%
	Women	34.0%
	Total	100.0%
Enrichment studies N = 128	Men	22.7%
	Women	77.3%
	Total	100.0%

Table 4.2 Distribution of learners by study topic, gender, and religiosity (percentage in each group)

Study topic	Gender	Secular (%)	Traditional (%)	Religious/ultra-orthodox (%)	Total (%)
Torah study	Male	14.3	11.4	74.3	100.0
	Female	25.0	38.9	36.1	100.0
	Total	17.9	20.8	61.3	100.0
Enrichment studies	Male	62.1	24.1	13.8	100.0
	Female	79.8	13.1	7.1	100.0
	Total	75.8	15.6	8.6	100.0

Table 4.3 Distribution of learners by marital status and study topic (proportion in each content group)

Marital status	Total (%)	Control (%)	Torah (%)
Single	6.8	7.0	6.6
Divorced	12.8	21.1	2.8
Widowed	6.4	7.8	4.7
Married	73.9	64.1	85.8
Total	100.0	100.0	100.0
Total unmarried	26.1	35.9	14.2

The second research question examines whether there is a difference in religiosity between those who chose Torah studies and those who chose general enrichment studies. Table 4.2 presents the distribution of learners by study topic, gender, and religiosity.

A χ^2 test showed a significant association between religiosity and study topic: $\chi^2 = 89.636$, $p = .000$. Most of the Torah students were religious and less were traditional or secular. In contrast, among those studying enrichment courses, the religious were in the minority. The proportion of traditional participants was higher in the group of Torah students than in the control group.

The third research question explored whether there was a difference in marital status between those who chose to study Torah and those who chose general enrichment. Table 4.3 presents the distribution of learners by marital status and study topic.

A χ^2 test showed a significant association between marital status and study topic: $\chi^2 = 19.691$, $p = .000$. The findings show that the proportion of those not married for various reasons (singles, divorced, and widowed) was much higher in the control group than among the Torah students.

Table 4.4 Distribution of learners by age and study topic (proportion of study topic groups)

Age group	Torah	Control
41–55	26.4	20.3
56–65	28.3	32.8
66–75	25.5	31.3
76+	3.8	7.0
Total	100.0	100.0
40 or younger	16.0	8.6

Table 4.5 Distribution of learners by years of schooling and study topic (percentage of content groups)

Years of schooling	Torah students (%)	Enrichment learners (%)
8 or less	2.8	.8
9–12	16.0	10.2
13–15	16.0	14.8
16–18	30.2	44.5
19+	34.9	29.7
Total	100.0	100.0

The fourth question sought to examine age differences between the Torah students and those studying general enrichment. Table 4.4 presents the distribution of learners by age and by study topic.

A *t*-test for comparing the means of the two independent samples showed a significant difference between the two groups by study topic: $t = -.1996$, $p = .047$. The mean age among the Torah students (M = 56.18, SD = 14.53) was lower than the mean age of the enrichment learners (M = 59.73, SD = 12.71).

The test also showed that although the mean age was similar, in the younger age group, 40 and younger, there were twice as many Torah students than in the control group. Participants close to retirement age (65) constitute 71% of the Torah students, versus 62% of the enrichment learners. It appears that Torah students begin to study earlier, before retiring, versus some 40% of those in the group of enrichment learners, who apparently begin to study only when they have the spare time.

The fifth research question sought to examine whether and to what degree there are differences between the two groups in years of schooling. Table 4.5 presents the distribution of learners by years of schooling and study topic.

A *t*-test conducted to compare the age means of the two independent samples showed no significant difference between the years of schooling in the two study topic groups: $t = -722$, $p = .471$. The mean years of schooling among the Torah students (M = 56.18, SD = 14.53) was slightly lower than the mean years of schooling among the enrichment learners (M = 59.73, SD = 12.71). The test findings show that there is indeed no significant difference in the overall education level of the learners, but the distribution test found differences, such that the group of Torah students had less education (with 35% having up to 15 years of schooling versus only 26% among enrichment learners, where 45% had 16–18 years of

schooling). In contrast, among the Torah students the rate of those with more than 19 years of schooling is high.

The sixth research question sought to examine whether and to what degree there is a difference in socio-economic status among those who chose to study Torah and those who chose general enrichment studies. Table 4.6 presents the distribution of learners by socio-economic status and study topic.

A χ^2 test showed no significant association between socio-economic status and study topic: $\chi^2 = .201$, $p = .904$. Notably, in both study groups no learners were found to have a low or very low status.

The seventh research question included two parts. First, it explored whether and to what degree the demographic background variables were related to subjective evaluation of the characteristics of studying (extent of efforts invested and significance attributed to studying) as well as the benefits of studying (satisfaction and contribution) by all participants. The second part extended this question: Among those who study in their spare time, whether Torah or enrichment courses, does the topic studied moderate the impact of the demographic variables on the perceived features of studying and its benefits?

Table 4.7 first presents the results regarding possible differences between the groups of learners in the features and benefits of studying. The differences were explored through a t-test.

In general, in all the tests that included the demographic variables, the scores for learning features and benefits of studying were found to be higher among Torah students than among those studying enrichment courses. The meaning of this finding is that in addition to the greater efforts invested in studying by Torah students, they also regard learning more positively and reap more benefits from their studies.

Table 4.6 Distribution of learners by socio-economic status and study topic

Financial status	Torah students (%)	Enrichment students (%)	Total (%)
Medium	22.6	25.0	23.9
Good	60.4	57.8	59.0
Very good	17.0	17.2	17.1
Total	100.0	100.0	100.0

Table 4.7 Exploring the impact of study topic on study features and benefits

Features and benefits	Study topic	Mean	Sig=
Significance	Torah students	4.68	.000
	Enrichment students	4.34	
Efforts invested	Torah students	3.83	.058
	Enrichment students	3.59	
Satisfaction	Torah students	4.61	.002
	Enrichment students	4.37	
Contribution	Torah students	4.72	.003
	Enrichment students	4.48	

Table 4.8 Summary of t-tests comparing the means of Torah students and enrichment students

	Significance	Efforts invested	Satisfaction	Contribution
Gender				
Men	.000	–	.036	–
Women	–	–	.009	.002
Ages				
41–55	.002	–	.021	.041
Marital status				
Married	.000	–	.037	.031
Socio-economic status				
Medium	–	–	.001	.031
Good	.016	–		.042
Very good	.001	.002	–	–
Religiosity				
Traditional	–	–	.017	.002
Religious/ultra-orthodox	.004	.006	–	–

Table 4.8 presents the summary of *t*-tests for independent samples. The table presents the significant results for the impact of demographic variables on the differences between the two groups.

Table 4.8 shows that all the demographic variables have significant associations with the perceived benefits of studying among both Torah students and those who study enrichment courses as a leisure activity (satisfaction and perceived contribution). There is also a significant association with the significance of studying. The demographic variables were not found to have a significant association with efforts invested in studies, aside from socio-economic status and religiosity. The higher the socio-economic status and religiosity the more efforts invested in studies.

4.10 Discussion

This study focused on the perception of studying as a shaper of the leisure culture. The context of the current study are the shifts in the perception of studying in general and of Torah study in particular, from the concept of exigency to voluntary studying as part of the culture and social identity of leisure-based students; the concept that sees enrichment studies as part of world culture and general education and Torah study as a sacred religious activity. According to the continuity theory and the serious leisure perspective, leisure is affected by the life patterns to which people are habituated. The current research examined the sociodemographic differences in gender, age, religiosity, marital status, education, and socio-economic status, among Torah students as a leisure activity and those participating in other enrichment studies as part of their leisure activities. The results indicate that respondents who chose to study Torah as a leisure activity were found to be mostly men, religious, and

married. In contrast, the respondents who chose non-Torah enrichment studies as a leisure activity (the control group) were mainly women, mostly secular (non-religious), and non-married (single, divorced, or widows). Nevertheless, it is interesting to note that studying at leisure may require a certain level of financial security. Participants in both study groups had in common being educated, with at least an average socio-economic status that allows spending more time in studying. Additionally, all students were older adults approaching or after retirement.

An additional aim of the research was to explore the association between the subjects in which the learners chose to engage as a leisure activity and students' perception of some of the activity's features (extent of efforts invested in studies and the significance attributed to studies) as well as the benefits attributed to engaging in studies (satisfaction with them and the perceived contribution to the learners) among participants with a varied socio-demographic background. All the tests that included the demographic variables found that Torah students have a stronger perception of the features and benefits of studying than that of enrichment students. Namely, those who study Torah as a leisure activity indeed invest more efforts in their studies but in return also perceive them as more significant and receive more pleasure from studying than those engaged in enrichment studies. It may be speculated that the Torah learners find this leisure activity as more meaningful than the participant in enrichment studies. However, such a speculation should be subject to further focused investigation. The results support the notion that studying as a leisure activity has undergone an essential transformation among older adults from its perception as an exigency, an obligation, to an activity involving choice and willingness, one that is not perceived as leisure by young people who see studies as mandatory.

This is a pioneer study that can lead to further studies that will continue to examine the change in the perception of studying as a leisure activity, irrespective of the contents studied, in a society where studying continues throughout life, at all ages and degrees of faith. Studying in general has the potential to offer equal opportunities, irrespective of one's socioeconomic status. The study sought to explore the world of older adults who choose to study, and to illuminate aspects that have little presence in the professional literature. The current research findings might have applied implications capable of contributing significantly to society as a whole. The research findings might have implications also for those who engage in guiding adolescents regarding leisure. The research findings support the idea that leisure activities in adulthood continue life patterns to which people have become habituated throughout life. It is important to develop intervention programs that can affect the ability to realize the leisure wishes of adults after having paid their debt to society, raised children, worked, and acted for the good of society. Perhaps it is not possible to expect an entire generation taught that "work is our life" to change its values completely when reaching retirement age. Hence, one solution that is emerging at present is to allow this generation to continue working in order to enable continued involvement in the labor world, whether by encouraging workplaces to employ older adults or as mentors. Many workplaces around the world appoint

retired workers as consultants who contribute of their professional experience to active workers.

In addition, participation in activities involving "serious leisure" should be encouraged. Serious leisure activities such as studying might be able to replace work, which is a better response to the work ethics criteria of seniors than other leisure activities, as they offer a framework, social ties, responsibility, challenge, and a sense of being needed. It is possible to encourage participation in serious leisure activities by more strongly stressing leisure occupations in general and serious leisure in particular as part of preparation programs for retirement, increasing seniors' awareness of available options of serious leisure in their residential area, planned appeals to seniors with the message "we need you". In summary, the special characteristics of senior citizens in Israel are manifested in their patterns of participation in leisure. Familiarization with how older adults in Israel utilize leisure and experience it is an important and significant step. The present research has several limitations that stem primarily from its utilization of the population living in central Israel, without including peripheral or rural areas, for whom, as mentioned, the field of leisure and studying constitutes a grave logistic problem. Hence, it is necessary to continue the research among these populations as well. In addition, while Torah study relates to a defined specific area, the enrichment studies explored cover other areas. Further research can try and focus on the differences between various disciplines such as theoretical studies, general knowledge studies or specific studies.

4.11 Conclusion

The above literature shows that adult studying has gradually undergone a change from exigency to extra-curricular activities, activities that are beyond the classical school time and place, studies that entail choice and pleasure. The findings of the current research demonstrate that the manner of studying by the current participants embodies these changes. This research suggests that among older adults learning ancient and sacred texts as a leisure activity is associated with greater investment of time, is considered more significant and accrues higher levels of satisfaction compared with studying enrichment courses.

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Chapter 5
The Discursive Construction of National Identity in Prescribed History Textbooks

Joseph Zajda

Abstract Using discourse methodology, the chapter examines the discursive construction of national identity in prescribed history textbooks. Data analysis consisted of interviews of secondary history teachers. The respondents offered detailed statements on the link between national identity, ideology, and Russian history textbooks. The interviews demonstrated that some respondents felt that certain key and controversial events were either ignored or not discussed critically in current Russian history textbooks. New research data was provided for the relationship between national identity and history education. Most respondents agreed that the national identity was formed through the study of historical narratives, depicting significant events in the history of Russia. Finally, most respondents agreed, which was indicative of the political climate in the RF, that the primary value of history education in schools was education for national identity, patriotism, and citizenship education.

Keywords Comparative education · Citizenship education · Curriculum reforms · Discourse · Discourse analysis · Discursive construction · Foucault · Genealogy · Identity · History education · Historical knowledge · Historical narratives · Historical thinking · History teachers · History textbooks · Ideology · National identity · Nationalism · Patriotism · Post-structuralist discourses · The Russian Federation

5.1 Discourse Analysis: Introduction

Using the discursive construction of national identity, with reference to power and cultural identity, the article is testing the hypothesis that one of the main goals of teaching history in schools in the Russian Federation is to inculcate desirable values of national identity, patriotism and nation-building. The theoretical framework used

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in this article is based on Foucault's discourse analysis and his use of genealogy. Some scholars argue that school history textbooks, represent a clear manifestation of ideological discourses in historiography and historical understandings (Zajda, 2021). The ideological function of textbooks has been analysed by De Castell et al. (1989), Apple (1993, 2004), Altbach et al. (2011), Anyon (1979), Crawford (2000), Pratte (1977), Provenzo et al. (2011), Zajda (2009, 2017) and others, mainly through the framework of structuralist and post-structuralist discourses in curriculum and pedagogy. Comparative education research in more recent times has shifted the focus of history teaching to examining history teachers' perceptions and understanding of historical knowledge, historical thinking and significant events, as described in prescribed history school textbooks (Whitehouse, 2018).

Globalisation has influenced the nature and directions of the discourses of national identities of modern nation states. Specifically, the process of globalisation, identity politics and policy reforms affecting school history textbooks was instrumental in a search for suitable sources of national identity in the past. In terms of Foucault's discourse analysis, discursive construction and his use of genealogy, it could be argued that globalisation has contributed to the *nostalgie du passé* or the nostalgia of the past, experienced by some nations, engaged in their nation-building exercise. School history textbooks, attempted to rediscover the preferred images of the past and a pre-modern sense of community, in order to instil the values of national identity and patriotism.

With reference to the use of discourse in analysing language and the text, Rea Zajda (1988) argued that 'Discourse is concerned with the social production of meaning'. These meanings, she argued, can be 'embodied in technical processes, in institutions, in patterns for general behaviour, in forms for transmission and diffusion and in pedagogical forms' (Zajda, 1988, p. 11; Foucault, 1977, p. 200). In this sense, Zajda (1988) argued 'it can also refer to not only statements, but social or institutional practices through which the social production of meaning takes place or is embodied' (Zajda, 1988, p. 11). She was one of the first researchers to examine discourses of the self and gender. More importantly, Zajda (1988) challenged the neutrality of knowledge and ideology in language and text. Zajda (1988) argued that the critical aspect of discourses challenges both 'the accepted hierarchical structuring of authority concerning knowledge and the neutrality of knowledge and ideology. It asks questions about the historical and cultural conditions in which discourses emerged' (Zajda, 1988, p. 12).

Although many writers have used the concept of discourse, it was Foucault, argued Zajda, who investigated the emergence of discourses relating to the modern self, reflecting subjectivity or individualism' (Zajda, 1988, p. 12). This theoretical paradigm is particularly relevant, not only in media studies, as employed by Zajda, but also as a research tool of critical analysis in the use of language, ideology and power in the construction of historical narratives in school history textbooks, as used by Zajda (2017), and elsewhere.

DA can be applied to any text under analysis. Since DA is basically an interpretative and deconstructing reading, there are no specific guidelines to follow. One could, however, make use of the theories of Jacques Derrida (1976), as well as of

other critical and post-structuralist researchers. Specific types of discourse analysis can be found in Foucault's books *The Order of Things* (1970), The *Archaeology of Knowledge* (1969), and *Power/Knowledge* (1980). Foucault (1969) argued that humans were influenced by the language and linguistic structures they used.

Another construct readily employed by deconstructionists in discourse analysis is **genealogy**. Foucault's philosophical approach, as explained by Zajda (1988), was inspired partly by Nietzsche's concept of genealogy in his book *On a Genealogy of Morals* (1967), where he attempts, according to Zajda to 'trace the beginnings of internalised moral behaviour, or a reflexive relation to the self in human beings' (Zajda, 1988). In Foucault's own explanation of the concept, genealogy is a research activity, which investigates both 'buried' scholarship or erudition and other forms of knowledge which have been 'disqualified' by the hierarchical structuring of knowledge and science (Foucault, 1980, p. 83). Genealogy, as such, argued Zajda (1988) 'aims to combine the results of these investigations, against the claims of totalising or unitary bodies of theory':

> In this sense he maintains that genealogies are not a 'positivistic return to a more careful and exact form of science. They are precisely anti-science' (Zajda, 1988, p. 13; Foucault, 1980, p. 83).

By this, Foucault (1980) means, explained Zajda, that genealogical investigations are not intended to restore 'those local discontinuous, disqualified, illegitimate knowledge' to a 'unitary body of theory, which would filter, hierarchise and order them in the name of some true knowledge and some arbitrary idea of what constitutes a science' (Zajda, 1988, p. 13). Rather, Foucault's intention was to use this knowledge to 'challenge the centralising power of total or unitary theories and the institutions and practices to which they are linked' (Zajda, 1988, p. 13). In this sense, Foucault was a genuine post-structuralist thinker.

It was Foucault's project, argued Zajda, to 'investigate the emergence of discourses relating to the modern self, reflecting subjectivity or individuation and particularly its construction in the human sciences':

> It was this preoccupation, which made Foucault's work so obviously useful in exploring the themes of the self and sexuality...Hence, the works of *Discipline and Punish* (1975) ... which developed this idea, have been refereed to most often (Zajda, 1988, p. 12).

A genealogy approach to analysis, as demonstrated by Foucault's works, also attempts to debunk highly regarded ethical values of scientific knowledge by showing their historical contingency (Minson, 1985, p. 18). Genealogy as a form of critique attempts to reveal the multiplicity of factors behind an event. In short, language and the meaning-making process of de-construction or discourse analysis create their own objects/subject dichotomy and, as Jacques Derrida (1976) had demonstrated his mistrust of metaphysical language and produced a new post-structuralist theory of meaning. He argued that there is no fixed boundary between 'signifiers' (signs, symbols) and 'signified' (intended meanings). According to Derrida, who used Martin Heidegger's notion of 'under erasure' (eg. the self), by crossing out the word, to stress that the word was inadequate but necessary, signs refer to what is absent, as 'meaning' is continually moving along on a 'chain of

signifiers', and we cannot be precise about its exact 'location', because it is never tied up to one particular sign (Sarup, 1993, p. 33).

5.1.1 National Identity as a Construct

Globalisation has contributed, among other things, to 'the strengthening of various cultural identities: religious, national, ethnic, and geographic' (Castells, 2006, 2010). The construct of cultural identity is associated with a reification of culture (similar to Marx's notion of 'reification'), which becomes a defining feature of the dominant discourse on identity (Bauman, 1996). Reification is the process of attributing concrete form to an abstract concept. Reification was used by Marx to describe a form of 'social consciousness in which human relations come to be identified with the physical properties of things, thereby acquiring an appearance of naturalness and inevitability' (Burris, 1988). Using the concept of reification, Marx tried to explain why workers accepted their labour and wages exploitation as natural.

Furthermore, identity is not that 'transparent or unproblematic', according to Hall (1996). Hall argued that identity is always positioned in the cultural context and, as such, is dynamic, as a continuous cultural process:

> Identity is not as transparent or unproblematic as we think. Perhaps instead of thinking of identity as an already accomplished fact, which the new cultural practices then represent, we should think, instead, of identity as a 'production', which is never complete, always in process, and always constituted within, not outside, representation. This view problematises the very authority and authenticity to which the term, 'cultural identity', lays claim (Hall, 1996).

Globalisation has affected collectivist and political identities of modern nation states (Wodak et al., 2009; Allan & Hopf, 2016; Perkins et al., 2019). In terms of Foucault's discourse analysis and his use of genealogy, it could be argued globalisation has contributed to the nostalgie du passé or the nostalgia of the past. New school history textbooks, engaged in the nation-building process, attempted to rediscover the past and a premodern sense of community, to instil the values of national identity and patriotism.

It could be argued, that in terms of time, the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation. A more recent example of a geo-political transformation of cultural identities was the sudden collapse of the USSR in December 1991, and collapse of communist countries in the Eastern Europe. Castells (2006) also pointed out that the nation-states have been weakened by various geo-political conflicts.

National identities may well represent in our memories 'imagined communities' (Anderson, 1991). With reference to the construction of national identity, and collective memory, it has been argued that such ideas build on 'the emphasis on a common history and history has always to do with remembrance and memory' (De Cillia et al., 1999, p. 154). The concepts of 'nation' and 'national identity'

were examined by numerous scholars, including, Anderson (1991), Smith (2001), and Zajda (2017). They critiqued some of the assumptions about the discursive construction of nations and national identities. Their analysis of 'nation' and 'national identity' was informed primarily by the works of.

The role of collective memory and the idea of remembrance in the construction of national identity was explored by Halbwachs in 1925, who coined the term 'memoire collective' in his book *Les Cadres sociaux de la mémoire*, re-published in 1950, and translated into English in 1992. He believed that collective memory made it possible for individuals to maintain their sense of historical continuity, by 'recalling specific elements from the archive of 'historical memory' (De Cillia et al., 1999, p. 155).

The role of historical narratives, explanation and the development of historical consciousness and national identity in the new generation of school history textbooks in the RF, with respect to the state, as explained by were: formation of the national identity (as defined in the History standards curriculum document), patriotism, and the 'formation in the young generation of directions for civic, ethnonational, social and cultural identity in the modern world' (National History standards curriculum document). The relationship between history curriculum and national identity was clarified by Aleksashkina (2013), the author of the National History standards curriculum document, thus:

> Forming of the national identity is proclaimed as one of the main goals of studying history at school (in the Standards).

As to what the key determinants of national identity were, Aleksashkina (2013), stated that one's consciousness of belonging to a nation, plays a significant part in this process:

> Self-consciousness of a personality as belonging to this nation (state, ethnic group), assuming its contemporary values and traditions, taking some place in the chain Past – Present – Future.

With reference to the role of Russian history textbooks in the formation of identity, Shubin (2013) points out that while there existed a trend to recognise the importance of all ethnic cultures in history, up to the nineteenth century, the history of the Russian people dominated the historical narratives:

> In current textbooks there exists a stance on the formation of civic identity, and the recognition of importance of all ethnic cultures in Russia. However, the history of the Russian people dominates the historical narratives (up to the 19th century, after which history of Russia becomes more unified). It is possible that future textbooks will offer a broader picture of the history of Russian people (Shubin, 2013).

Shubin (2013) also suggested that what determine the national identity were the significant events of Russian history in people's memory and consciousness:

> Determinants of the national identity are significant events of people's history. For example the fights against the Mongols is a significant determinant for the Russians, but not for Tartars. The later historical events have the same significance for all people of Russia (For example, the Great War of the Fatherland). However, they are valued differently by different ideological and social sectors of society, which are almost independent of ethnicity.

Koval (2013) believed, like many other Russian history teachers, that students' national identify was formed by prescribed Russian history textbooks:

> The formation of the Russian identify is defined to be the main goal of studying Russian history in schools. Furthermore, both politics and ideology define the politics of the identity formation process. At the government level this is the one and only process (Koval, 2013).

In the RF, as in other countries undergoing a similar process of nation-building, the three most significant issues defining the re-positioning of the politically correct historical narratives are—national identity, preferred images of the past, reminiscent of Anderson's 'imagined community', and Putin's (2013) version of national identity and patriotism.

5.2 Discourses of National Identity in History Textbooks: Background

It is argued that the issue of national identity and balanced representations of the past will continue to dominate the debate surrounding the content and pedagogy of history textbooks in the Russian Federation (RF). It is argued that a shifting geo-political climate and the Kremlin-based history reform tsars will continue to define and shape the nature and significance of historical knowledge, national identity, ideology and the direction of values education in prescribed Russian history textbooks in Russia (Zajda, 2017). The first survey of 200 Russian secondary history school teachers, across the Russian Federation (RF), focused on collecting secondary history teachers' responses to representations of historical narratives covering 1762–2012. The survey of secondary history teachers represented the first international survey of secondary history teachers conducted across the RF. Questions referred to balance in the content, as well as whether textbooks were important in teaching, whether they were accurate, whether current textbook narratives were creating new representations in Russian history, and whether these new narratives generally promoted nationalism and patriotism by emphasising "bright spots" in Russian achievements (Aleksashkina, 2013; Zajda, 2017).

The second and smaller data collection consisted of a purposeful sample of the follow-up interviews of Russian secondary history teachers in Grades 8–11 conducted in Moscow in 2013. They were designed to illuminate further some of the gaps in the survey dealing with historical narratives, and historical understanding, as documented in prescribed Russian history textbooks. The sample was a purposive sample with a defined quota of 34 history educators drawn from three major sectors of education: the school sector in Moscow, the Russian Academy of Education, and the Institute for Curriculum/in-Service provider. The sample consisted of Russian secondary history teachers, textbook authors, academics, and curriculum writers. There were 23 Russian secondary history teachers (they were all from Moscow), three Russian history textbook authors, four academics and history curriculum writers, two Russian history in-service providers, and two Russian

history journals editors. The data from the interviews offered additional qualitative and in-depth material, which illuminated further some of the issues raised in the completed survey in the RF.

5.3 Discourse Analysis of Data

Theme-focused qualitative interviews, as part of discourse analysis, were conducted with secondary Russian history teachers, authors, academic historians and curriculum writers, who were asked to respond to questions concerning different and significant historical events, and different dimensions of national identity. The questionnaire used contained 12 core questions. They were divided into four themes: *Controversial aspects of history* (3 questions), *politics of implementation* (2 questions), *national identity* (3 questions), and *values, perspectives and moral judgements* (4 questions). All Russian sources cited in the article, including the Russian history teachers' interviews (in Russian) were translated by the author.

Using the discursive construction of national identity and methodology, based largely on Foucault's discourse analysis and his use of genealogy, I have employed the following discourse-analytical tool to analyse the main themes and categories, documented by interviews extracts from 34 participants in Moscow:

- *Content: themes, key events and concepts*
- *Language, power and ideology*

With reference to 'Content: themes, key events and concepts', I have focused on two epistemological categories relevant to the discursive construction of national identity in history textbooks:

- The narratives of socio-political history
- The discursive construction of national identity

5.3.1 Controversial Aspects of History: Content: Themes, Key Events and Concepts

This section had three questions. For Question 1: 'What have been the most controversial content topics in relation to the Russian school history curriculum, and why?' the respondents often mentioned the following three significant events:

- the Russian Revolution (c. 13),
- the Civil War (c. 8), and
- World War II (c. 11).

The answers also provided the following significant events, and key actors, which were mentioned by various respondents, with reference to the most controversial

topics in Russian history textbooks. They included: the origins of the Ancient *Rus*, Peter the Great's reforms, Catherine the Great's reforms, the Great Reforms during the nineteenth century, Stalin's part in Russian/Soviet history, the mass repressions during the 1920s and the 1930s, collectivization, deportations, the annexations of the Baltic States, the Cold War, *perestroika*, and the political and economic reforms in the RF during the last decade.

What is new here is that almost two-thirds of the interviewees regarded the Russian Revolution and the Civil War as the two most controversial topics in Russian history textbooks (Zajda, 2015, 2017). Some Russian history teachers believed that the whole period, between 1917 and 1953 depicted the most controversial decades in the study of Russian history in secondary schools. Interviewees gave two main reasons for this. First, there are unresolved ideological and competing interpretations of historical narratives depicting these events. Second, history textbooks offer very sketchy details, followed by simplistic, almost one-dimensional interpretations, which completely ignore the complexities of the historical milieu and contested meanings associated with these events (Zajda & Whitehouse, 2018).

For Question 2: 'In your view, what important content topics have been omitted or under-represented?', the respondents mentioned such topics as the reign of Catherine the Great, World War I, the Civil War, the Soviet-Finnish War, deportation and the population transfer of ethnic minorities, the achievements of Russian scientists, cultural history, and the protest movements. The author translated the interviewees' comments from Russian to English. Zajda translated the interviewees' comments from Russian to English. The answers included such statements as:

> In each case an answer will be rather subjective. As the content of school textbooks is restricted by a number of pedagogical obstacles, authors themselves have no ability to include each desirable topic. So an attempt to enumerate omitted facts and even topics seems to be a subjective and an ideal action. But it's possible to point out (with a great measure of objectivity) some *aspects* which are under-represented in our textbooks. These are the following: history of spiritual life and culture; ethnic history and history of nations (not only states); cultural interferences in the Past and in the contemporary World; every-day life and others (F, Professor, Academic Historian, Book Author & Curriculum Writer);
>
> World War I, history of everyday life. Achievements of Russian scientists, Russian science, the search for the 'national idea' and the formation of civic mindedness (*gosudarstevennosti*) among the Russian people during the XIX and beginning XX centuries. The conditions of non-Christian religions in Russia during the 16th and 20th centuries (F, Academician, professor, textbook author);
>
> The approaches to the study of the 1990s. It is such a 'contemporary' history (*svezhaia istoriia*). Many of the participants in those events are still living (F, History Teacher).
>
> Classroom sessions on politically sensitive topics I conduct in a way as not to impose my own personal views. We conduct open group discussions [on these topics] (F, History Teacher);
>
> The program is overloaded by a large number of insignificant details, which make it difficult to grasp significant things. The problems of culture are not very well covered (F, History Teacher).

The narratives of socio-political history were answered by Question 3: 'How do you normally handle socially and politically sensitive or contentious topics in the classroom?' was answered in different ways. Some respondents indicated that

different opinions on interpreting historical narratives were presented during class discussions. Others referred to the use of a variety of primary and secondary sources:

> Usually different points of view are presented. Tasks for students are: (1) to compare views (judgements); (2) to define a position (of analysis/reason) of each topic; (3) to estimate arguments of each position; (4) to make their own judgement (F, Professor Academic Historian, book Author & Curriculum Writer);
>
> I show [the students] the different approaches, using sources (tasks: compare and contrast, find the differences, give arguments to support each, analyse sources and make your own conclusion, to what extent do you agree – disagree that . . . (F, Academic Historian & Teacher);
>
> I am a follower of open discussion in the classroom, which involves as many students as possible (M, Professor Academic Historian, book Author & Teacher);
>
> I ask my students to read independently additional literature and discuss the topic (F, Russian History Teacher);
>
> I locate different sources, and suggest [to students] to express their opinions. Also attempt to organise the discussion (F, Guseeva, History Teacher);
>
> I select reading literature and works of different historians, which together demonstrate the whole spectrum of existing positions concerning the analysis of the content. I have discussions, arguments and evaluations of different interpretations (F, Academician, professor, textbook author);
>
> On the basis of concrete facts and events I explain the essence of the problem, so that students, on the basis of their own perceptions can formulate their own opinions and evaluation. In most cases, the judgement is based on workshop discussion, TV and the internet. At times we reject incorrect stereotypes. For instance, some students regard the Reds as the Evil. Others, by contrast, regard the Whites as the Evil (M, History journal editor).

A very structured response was presented by the following response, containing four approaches in handling sensitive issues:

1. Analytical work with documents, presenting different views.
2. In-depth class presentations on the theme, with different points of view. This is prepared by two students [leading the discussion]. The teacher acts as a consultant. After the presentation by the two students, it is necessary to offer a comparative analysis. Two view points, or two conclusions. In the concluding part, the teacher may express his/her view, and nothing more.
3. Debates. Groups prepare their arguments and support their viewpoints.
4. Essays. For example, 'Peter the Great: a Hero or a villain?' (Academician, author, teacher 30 years teaching experience).

5.3.2 The Politics of Implementation

The narratives of socio-political history continued in Questions 4 & 5.

Question 4:'In your view, what pressures and/or key debates have played parts in the history curriculum development and implementation process?' the following represent different views:

> In the 2000s the process of the history curriculum development seems to be rather free and diverse (multilevel). Now we have: (1) the so-called Exemplary [Sample] curriculum (recommended by the Ministry); (2) curricula for textbook packages, edited by publishing

houses (curricula are written by authors). Even more – teachers are motivated to construct their "working [teacher] curricula". (F, Professor Academic Historian, book Author & Curriculum Writer);

Today, it is the problem of the "single textbook" (F, Academic Historian & Teacher);

Until recently societal and academic polemics played a key role. But, recently, President Putin joined in the process of the preparation of the textbook, demanding the creation of the single textbook, with a single conceptualisation of contested historical questions (M, Professor Academic Historian, book Author & Teacher);

Zakaz (to order) by the State (F History Teacher);

Contemporary political conditions in the country (Ticheeva, St Petersburg, History Teacher);

Theoretically, politics should not influence the teaching of the past. The Constitution of the RF forbids the teaching of a dominant ideology. In practice, however, the content of history curricula is dependent on the government (F, Academician, and textbook Author Russian History);

The government attempts to influence the development of the history curriculum programs, and finds it somewhat difficult in today's climate (F History Teacher).

Most agreed that the politics, the government and the *zakaz* (written to "order" issue JZ) played a significant part in the Russian history textbooks and curriculum development.

The next question, Question 5: 'Do you feel that there are political or ideological dynamics involved in the implementation of the history curriculum?' was answered in the affirmative in most instances:

At this very moment the New History Standards for History textbooks are being developed. The government exerts pressure to solve controversial questions in Russian history from a single point of view.

This may result in the strengthening of authoritarianism in education in schools [history] (M, Professor Academic Historian, book Author & Teacher);

Generally, history is addressing Russian national identity, and there is inadequate information on inter-ethnic unity (F, Russian History Teacher);

Apart from classroom lessons national identity should be taught and developed in the family, the state (through cultural organization), religion, etc. (F, Russian History Teacher);

Very huge [impact on history curriculum], because the false perception of patriotism very strongly influences all history curricula (F, author, history textbook writer, Russian History Teacher).

Most of the respondents agreed that there existed a 'direct" link between politics and the implementation of the history curriculum.

5.3.3 Discursive Construction of National Identity

The discursive construction of national identity was addressed by Questions 6–9.

Question 6: 'What do you see as the relationship between history curriculum and national identity?' was answered as 'Yes', as teaching the notions of national identity and patriotism was the key role of history education in schools. Teaching the values of national identity and patriotism was listed in the National History Standards policy documents, and History curricula:

> Forming of the national identity is proclaimed as one of the main tasks of studying history at school (in the Standards). (F, Professor Academic Historian, book Author & Curriculum Writer);
>
> In current textbooks there exists a stance on the formation of civic identity, and the importance of all ethnic cultures in Russia. However, the history of the Russian people dominates the historical narratives (M, Professor Academic Historian, book Author & Teacher);
>
> The history of the Fatherland, culture and wars (F, Russian History Teacher);
>
> The struggle for independence. The fight against the enemies of the Motherland (F History Teacher);
>
> Under the influence of historical events, the most significant ones for the formation of a national identity – the Russian people and their fight for independence against the Mongols, the 1812 War etc. (F, History Teacher);
>
> The national identity is formed under the influence of Russian history and wars (F, Russian History Teacher);
>
> There are at least two views on the national identity: nation as the 'ethnos' and nation as collective citizenry. The second is more meaningful for me (F, Academician, and Russian History Teacher);
>
> Under the influence of tradition and propaganda (F, author, history textbook writer, Russian History Teacher).

Some respondents, as demonstrated above, viewed the relationship between history curriculum and national identity, through the lenses of the history of the Fatherland, the struggle for independence, and the wars of liberation.

Question 7: 'What do you believe are the key determinants of national identity?' was answered as follows:

> The self-awareness of a person as having a sense of belonging to the nation (state, ethnic group), of assuming its contemporary values and traditions, of taking some place in the chain Past – Present – Future (F, Professor Author, curriculum writer);
>
> – The belonging to the certain ethnic group, which is the question of self-determination (not "blood"). (F, author, curriculum writer, History teacher);
>
> Determinants of the national identity are significant events of peoples' history. For example the fights against the Mongols and Pushkin (early 19th century poet) are significant determinants for the Russians, but not for Tartars. The later historical events have the same significance for all people of Russia. For example, the Great War of the Fatherland. (M, Professor Academic Historian, book Author & Teacher);
>
> Values, perspectives and moral education M, Professor, Academician, book Author).

Although most agreed that the key determinants of national identity included belonging to one's nation, and knowing one's history and culture, the responses revealed the complexity of the term and some confusion between 'citizenship' and 'nationality'. Shubin (2013) believed that significant events in Russian history were determinants of the national identity:

> For example, the fights against the Mongols, and Pushkin are significant determinants for the Russians, but not for Tartars. The later historical events have the same significance for all people of Russia (For example, the Great War of the Fatherland). However, they are valued differently by different ideological and social sectors of society, which are almost independent of ethnicity (Shubin, Interview, 15 July 2013).

Tatiana Koval (2013) also noticed this confusion among her history teachers in Moscow. Koval (2013), when examining the formation process of national identity,

noted the confusion in the minds of Russian history teachers, caused by the duality between ethnicity (*natsionalnost*) and citizenship (*grazhdanstvo*):

> For many [Russian history teachers interviewed] the meaning [national identity] refers to, what we call, 'natsionalnost' (ethnicity). The second meaning, which individuals begin to understand, is 'grazhdanstvo' (citizenship)... It seems that both meanings are either mixed, or used in an interchanging manner. I think the ideal solution for countries like ours is to adopt the concept of "I am Kalmyk-Russian", or "I am a Jew-Russian" (Koval, Interview, 3 December 2013).

This duality concerning national identity may be a legacy of the Soviet era. In the Soviet Union, passports listed two official identities: citizenship (*grazhdanstvo*) and nationality (*natsionalnost*). These two official identities may be perceived to be a 'contradictory legacy' of the ethnographic heterogeneity of a former multi-national imperial Russia. This dual identity in passports continued until 1991.

In the Soviet Union, in addition to citizenship, 'the state-sponsored institutionalization of nationality became an ascriptive legal category' (Brubaker, 1994, p. 53). It legalized and codified both nationhood and nationalities as official categories. A possible return to the Soviet legacy of dual national identities has been signalled by the poll conducted by the *Moscow Times* (September 25, 2013, http://www.themoscowtimes.com/opinion/article/returning-nationality-to-passports-is-a-bad-idea/486559.html).

The poll reported on the survey concerning nationalities in passports. More than half (54%) voted 'Yes' for the return of dual identities. A third claimed that it denigrated the notion of citizenship as a whole. The poll results suggest that Russian nationalism is on the rise.

Question 8: 'Do you see discussion of national identity as part of your role as a history teacher or curriculum official?' was, in the main, answered as 'Yes', and below are some of the answers:

> Yes. This discussion is one of the most significant ones. It takes place in schools during class sessions, because, as a rule, students are interested in their national roots (M, Professor Academic Historian, book Author & Teacher);
>
> Yes, I do. I feel my personal responsibility in the discussion of national identity. I participated in debates about the idea of national identity (F, History teachers, 21-year teaching exp.)

5.3.4 Discursive Analysis of Language, Power and Ideology: Values, Perspectives and Moral Judgements

There were four questions in this section. Question 9: 'Do you see the representation and discussion of alternative and multiple perspectives in history education as the highest priority for a school history curriculum? Are there higher priorities?' was answered, in most cases, as 'Yes':

> Yes, as History itself is multi-perspective [narratives] and [offering] alternative [views] (F, Professor Author, curriculum writer);

I promote multiple interpretations in history education ... (M, Professor Academic Historian, book Author & Teacher).

Question 10: 'Is there a role for moral judgement in history education?', was also answered mostly as 'Yes', and some respondents provided additional information on ethics and moral values in Russian history classes:

Yes, but *only after* attempts to explain and understand people and their activities within their time (F, Professor, Author, curriculum writer);

Ethical issues play their own part in education. However, it is important to ensure that moral judgements are not embraced, [in such a way] as to contradict historical facts demonstrated by research (M, Professor Academic Historian, Book Author & Teacher).

Yes (but with the special remarks about different [moral] standards in different times) (F, author, curriculum writer, History teacher);

If we discuss the influence of Russian civilization on the world's history, we consider moral judgement as the main aspect of history education. On the other hand, the principles of the constitutional state deny moral judgement: '*Dura lex, sed lex*' [The law is harsh, but it is the law] (F, History teachers, 21 year teaching experience.).

Question 11: 'How would you define an historical fact?' revealed that there seemed to be a consensus that historical fact represented an event that was real and empirically valid:

In school courses we are speaking of at least three kinds of historical facts: (1) a fact as an event; (2) a fact of a source; (3) a fact of a historian (F, Professor, Book Author, curriculum writer);

The fact is the event. The other things are "opinions", "judgements" and so on (F, author, curriculum writer, History teacher);

Historical fact is a rational model of reality, stemming directly from empirically available sources (M, Professor Academic Historian, book Author & Teacher).

It [historical fact] is an event, the reality of which is validated by trusted historical sources (F, Academician, history professor, textbook author).

Question 12: 'In your opinion, what is the primary value of history education?' yielded many interesting responses, ranging from identity formation, critical thinking, citizenship education and education for patriotism:

Understanding of who am I and who are the people and the society around me (in my country, in the World) (F, Professor, Author, curriculum writer);

Critical thinking and the formation of "personal culture" (F, author, curriculum writer, History teacher);

The main value of historical education is that it unites the young person with the cultural field, which can be developed further (M, Professor Academic Historian, book Author & Teacher);

Offering a humanistic view, and teaching patriotism (F, history teacher);

Discovering the sources for contemporary phenomena, explaining reasons for and limitations of events; finding the possibility for offering different variations for human behaviour in different situations (Academician, history professor, textbook author);

Preparing a responsible and rational member of society (citizenship education) (F, History teacher);

The ability to think critically, work with documents and the upbringing of patriots (F, History teacher);

For history education in schools:

1. The development of civic education.
2. Skills for working with historical documents.
3. Knowledge of historical facts: What? Where? When? (F, academician, history teacher).

Many of the respondents saw the primary value of history education in offering to students a more informed and critical perspective on historical events, and a better understanding of the sources and construction of historical knowledge in Russian history textbooks.

5.4 Discussion

Discourse data analysis of the responses to the four sections 'Controversial aspects of history', 'The politics of implementation', 'National identity', and 'Values, perspectives and moral judgements' yielded informative and relevant data. The 'Controversial aspects of history' answers ranged from the Russian Revolution to World War II. As to the important topics that have been omitted or under-represented, the respondents mentioned such topics as World War I, the Civil War, the Soviet-Finnish War, the Great War of the Fatherland, the deportation and population transfer of ethnic minorities, the history of culture, and the contemporary history of the RF (the last two decades, in particular).

With reference to the 'the politics of implementation' section, most respondents agreed that politics, the *national ideology*, as referred to by President Putin, and the state defined the content of the National History Curriculum, History Standards, and Russian History prescribed textbooks by the Ministry of Education and Science (see Putin, 2012a, b, 2014). Most of the Russian history teachers interviewed also agreed that there was a nexus between politics, national ideology and the approved core Russian history textbooks for secondary schools across the RF.

The 'National identity' section demonstrated that most of the respondents agreed that there was a direct association between history curriculum, the prescribed Russian history textbooks (which were based on the National History Standards) and national identity (Zajda, 2017). They also agreed that the key role of history education in schools was to teach patriotism, and one of cultivating a distinctly Russian national identity. To them, the key values of national identity were defined by belonging to one's nation (see Anderson, 1991), and one's knowledge of significant historical events, which contributed to the evolution of Russia and the RF.

The 'Values, perspectives and moral judgements' section showed that respondents agreed on the need to use a diverse interpretation of historical narratives. There was a consensus, on the role of moral judgments in history education in schools, but through the critical thinking perspective. Some teachers were aware of cultural relativism, which is the view that all beliefs, and ethics are relative to the individual within his own time, and social context. As to the primary value of history education, respondents mentioned identity formation, patriotism and citizenship education.

5.5 Conclusion

The use of a discourse-analytical tool to analyse the main themes and categories, specifically the use of language with reference to content, themes, key events, concepts, power and ideology, demonstrated a certain degree of consensus among the participants that the core value of history education in schools was education for national identity and patriotism. The above discourse data analysis of responses of Russian history teachers reveals four relevant outcomes. Firstly, there was much more information provided on the important topics that have been omitted or under-represented. Secondly, the respondents offered detailed statements on the link between national identity, ideology, and Russian history textbooks. Thirdly, new data was provided for the relationship between national identity and history education. Most participants agreed that the national identity is formed through the study of historical narratives depicting significant events in the history of the Fatherland. Finally, most participants agreed, which is indicative of the current political climate in the RF, that the primary value of history education in schools was education for patriotism, and citizenship education. These responses demonstrated the significance of ideology in discourse analysis data of history education, where nationalism and patriotism were defining, and continue to do so, the structure and the content of prescribed Russian history textbooks in schools across the RF. Discourse analysis data re-affirms the significance of the role of historical narratives in the development of historical consciousness and national identity in school history textbooks.

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Chapter 6
Canada's Response to the Syrian Refugee Crisis. Easing the Transition to Integration

Suzanne Majhanovich

Abstract The chapter offers a critical evaluation of Canada's action taken to assist the neediest refugees from Syria. The author focuses her research findings on a program organised by a local school in London (Ontario) to ease transition to the Canadian education system for the migrant children with little or no knowledge of English. GENTLE, or the Guided Entry to New Teaching and Learning Experiences Centre has been designed to help the migrant children and adolescents in the school setting. In particular, one program with the acronym GENTLE is highlighted, organized by the local school board to ease the transition to the Canadian education system for the migrant children and adolescents. The challenges faced by newcomers trying to learn a new language and fit into a new culture are presented with a prognosis for the future.

Keywords Canada · Canadian education system · Democracy · English · Language acquisition · Migrant children · Refugees · Syria

6.1 Context

The situation in the Middle East has resulted in a refugee crisis that has not been seen since the aftermath of WWII. Europe has been particularly involved in dealing with an unprecedented influx of refugees but the rest of the developed world has been called upon to help the homeless needy masses fleeing war and destruction in their homelands. Canada has a history of helping out when a refugee crisis somewhere in the world arises; one need only recall the number of people accepted from Hungary in the 50s after the Hungarian revolution, the Tibetan families who found their way to Canada, or the case of Vietnamese boat people where between 1975 and 1980, Canada accepted over 55,000 Vietnamese to its shores many of whom spoke neither English nor French without any relatives already living in Canada. The story of the

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Vietnamese acculturation to Canada is largely one of success and has provided Canada with the tools and resources to help in other situations of human catastrophe. (multiculturalcanada.ca/vietnamese).

Canada is a country that has been built on immigration, first with waves of people coming from Europe, but more recently from Asia, the Caribbean, Africa and Latin America. Being a sparsely populated country with a low birthrate, Canada depends on immigration for its growth and development. Over the past few decades Canada has accepted about 250,000 immigrants per year with exceptions in times of economic downturn when the numbers were dropped to about 90,000 per year. The fact that Canada actually has a multiculturalism policy, introduced in 1971 which as former Prime Minister Pierre Elliot Trudeau declared established Canada as "multicultural within a bilingual framework" acknowledges that Canada is a country of immigrants in which the contributions of different cultures add to Canada's notion of its identity. Despite those who would claim that multiculturalism does not work in Canada, and allows people who come from elsewhere to retain their languages and cultures without having a sense of belonging to Canada, Jedwab (2016) cites data from Statistics Canada that shows that of those who claim a strong sense of belonging to "people with the same ethnic/cultural background" about eight in ten also claim a strong sense of belonging to Canada" (Jedwab, 2016, p. 2). This would imply that Canadian identity includes belonging to cultures other than those of the so-called founding Anglo-Saxon and French groups and accepting a diversity of ethnic groups. So it is no wonder that so many Canadians are ready to welcome and help new groups of people fleeing violence and destruction in their home countries and work to accept them into the Canadian family.

Canada recognizes different types of immigrants: economic immigrants who are professionals and skilled labourers who can make a real contribution to the Canadian economy; family reunification which includes programs to bring immigrants to join family already in the country; and refugees and those accepted for humanitarian reasons. According to the United Nations definition, a refugee is someone who "owing to a well-grounded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his [sic] nationality, and is unable to, or owing to such fear, is unwilling to avail himself [sic] of the protection of that country." (UN Refugee Convention). Under the previous government, numbers of immigrants per year had dropped slightly and those designated as economic immigrants (those who will bring investment to Canada, often committing to investing $300,000 in the country as a start, are professionals or skilled laborers) were favoured. The new government has tried to put a more humanitarian face on its immigrant and refugee program, and in addition, has upped the number of immigrants expected for 2016 to about 305,000 from 250,000. It is interesting to note the comparison between targets for 2015 (under the previous government) and for 2016 under Canada's new Liberal government: economic immigrants 2016—160,600 compared to 2015—181,300; family reunification 2016—80,000 compared to 2015—68,000; refugees and humanitarian class 2016--59,400 compared to 2015—29,900 for totals of about 300,000 in 2016 and 279,200, 2015 (www.cicnews.com/2016/03/).

6.2 Canada's Response to the Crisis in Syria

It was probably the picture on September 15, 2015 of the three-year old child, Aylan Kurdi, lying dead on a beach after drowning off the Turkish coast when his family was trying to flee to relatives in Europe, that brought attention to the terrible plight of Syrian refugees. In Canada this tragic sight was particularly striking because his aunt lived in British Columbia and had been trying unsuccessfully to sponsor part of the family. The previous Conservative government in Canada, while outwardly sympathetic to the situation had not really committed itself to accepting more than a handful of Syrian refugees. The outcry over the death of Aylan Kurdi moved the government to announce that it would accept 10,000 Syrian refugees in 2016. Since an election campaign was underway, the refugee issue became a major part of the platforms of the various parties competing for election. The Liberals who eventually won the election in October, pledged that they would bring 25,000 refugees to Canada by the end of 2015. Once elected they began to put plans into effect to process the refugees although they soon realized that since they were only starting the program in November, it would be impossible to meet the full quota by the end of the year, so they aimed at 10,000 by the end of December, and 25,000 by the end of February, 2016. The refugees who were accepted consisted of some who were privately sponsored and others sponsored by the government. Welcoming centres were set up at the airports in Toronto and Montreal and on December 10th the first planeload of privately sponsored refugees was welcomed at Toronto International Airport. The government arranged for chartered flights to bring large numbers of migrants, mainly leaving from Lebanon and Jordan, but with some from Turkey as well. By February 27th, some 25,000 Syrian refugee arrived in Canada. By the end of 2016, over 27,000 had arrived and were gradually being welcomed into 277 communities across English Canada, with others going to 13 cities and towns in Quebec. As of May there were 16,167 settlement applications being processed in the Near East with 2813 of them finalized although the refugees were not yet on their way to Canada.

According to the "Welcome Refugee" web page of the government office Citizenship and Immigration Canada (www.cic.gc.ca/english/refugees/welcome/milestones.asp) the process for accepting the refugees follows a five-step plan:

1. The UNHCR working on behalf of Canadian immigration identifies those who are interested in coming to Canada; UNHCR sent 60,000+ texts and phoned 70,000+ refugees to find out if any were interested in coming to Canada. Many were not interested having never heard of the country or knowing only that it was a cold northern land. Canada has chosen to give priority to the most vulnerable people who are low security risks and include mainly women or complete families.
2. The applications including security and health screens are processed overseas (in Lebanon, Jordan or Turkey); health screening checks for diseases such as tuberculosis which would prevent acceptance. Security checks include document reviews and, biographical and biometric (e.g. fingerprints) checks. All potential

refugees are given an interview before being accepted and once accepted they are granted permanent resident visas.
3. Transportation is arranged to Canada (until February 29, 2016 the government chartered and paid for flights bringing refugees. Now either sponsors or the refugees will have to organize transportation although the government has pledged to repay travel costs);
4. Refugees arrive in Canada, probably in Toronto or Montreal and are greeted by sponsor groups or government groups organizing their resettlement;
5. Refugees move to the communities for settlement and integration.

Once refugees have been officially accepted, their applications processed and they have secured landed status, they will receive government support for 1 year including health care and are housed either in furnished apartments that have been rented for them (usually this refers to those coming under the private sponsorship program) or in the case of government sponsored people, they may be temporarily housed in hotels until more permanent accommodation can be found. When they arrive they are given an initial $900 per family plus $620 of social assistance per month for rent plus $240 per month for each adult in the family for food and goods; each child gets a $300 per month tax benefit (Globe and Mail, Folio, February 29, 2016).

6.2.1 Process of Resettlement

To clarify how the program is working for newly arrived Syrian families, let us look at how London, Ontario is addressing the needs of the refugees who have arrived here since the program began. The issues that need to be addressed are housing, medical care, education and eventually employment. For those refugees who arrive privately sponsored, the situation is perhaps easier since the sponsoring groups will have already arranged for accommodation, furnished the apartments and provided major living needs for the family they are welcoming. In most cases the sponsored Syrian families are smaller than those under the government assisted program and quite often the privately sponsored families will have at least one member who has some knowledge of English and who comes with skills that can result in employment. For example, there was the case of one man who had been a jeweler in Syria who was sponsored by a group that included someone who owned a jewelry factory. This person hired the Syrian jeweler to work in his factory which also included others who spoke Arabic. So this particular refugee quickly found work in his area of expertise in a facility where there were others who spoke his first language.

For Syrians who come as government assisted refugees (GARs) the challenges are greater. In London the main organization that supports all newcomers, but particularly those in greatest need is the Cross Cultural Learner Centre (CCLC). The CCLC, working with other city agencies helps the newcomers find accommodation and other services. They report that as of the end of January 2016 they had worked with 80 GAR families including 415 people. At that time they had managed

to find permanent housing for 15 families with the remainder temporarily housed in local hotels and residences under CCLC control. In their April bulletin they reported that they had been able to find permanent housing around London for 149 families (780 people) or 85% of all Syrian refugees who had arrived in London (CCLC Newsbulletin, April 4, 2016).

The CCLC runs a Resettlement Assistance Program for GAR families that provides orientation to the newcomers presented in the Arabic language on such topics as budget entitlement, responsibilities, managing money, the Canadian health and education systems, services available in the community, family life, living in Canada and housing. The CCLC can call on 35 Life Skill Workers who speak Arabic who match with the refugee families first when they are in temporary housing and then later once they find permanent dwellings to orient them to cope with their new life. Further orientation sessions are available including job search workshops, and language and referral services (CCLC Bulletin, April 2016). The CCLC has found that many GARs have medical, mental and emotional needs and many suffer from PTSD (post-traumatic stress disorder). Working with the InterCommunity Health Centre the CCLC has been able to help GARs to meet with medical and/or dental teams; a separate program has been set up with opticians in the community to check vision and provide corrective lenses where necessary for both adults and children. They have set up a clinic at the CCLC office where Syrian GARs can be medically screened and can be connected to family physicians.

An important partner agency in London is the Merrymount Family Support and Crisis Centre which helps children and their families in difficulties. This organization helps both parents and children and is particularly qualified to help those who have experienced psychological traumas. They are dedicated to helping the families create a happy and safe environment as they transition to their new situation in Canada. They are also concerned with providing children with the experiences that will assist them academically and in social involvements.

Another service provided is the Youth Empowerment Program designed to inform Syrian GAR youth about services and resources available to them in the community. It is also a place for youth to practice their growing English skills and openly express any concerns they have. Other organizations such as the YMCA and the Boys and Girls Club of London have arranged excursions for the young people to orient them to the community and introduce them to local museums and art galleries. They also facilitated their joining sports teams that interest them.

6.2.2 Entering the School System

One of the prime concerns of parents, once they are settled in their new community is to enrol their children in schools. Since the GAR families were among the most vulnerable and destitute, many of their children have never had the opportunity to go to school or have only sporadic schooling in their background. Likewise, the parents of the GAR Syrian families chosen for Canada may also have little or no schooling

and most of the GAR's have little or no knowledge of English. In London, the Thames Valley Board of Education set up what they call the Guided Entry to New Teaching and Learning Experiences (GENTLE) Centre. They located it at White Oaks Elementary School, a large school in an area of the city with a large immigrant population. White Oaks is more than an elementary school but also contains a sort of community centre to serve the local population. The GENTLE Centre is both for parents and children and families attend to learn how the Ontario school system works and also are assessed for appropriate levels of English as a Second Language classes. They can also gain access to special education services and psychological help for those suffering trauma from their experiences in the old country. Children are assessed for literacy and numeracy and begin learning basic concepts. Because the refugees are arriving daily, the program is ongoing to accommodate newcomers as they settle in London. The program runs for 5 or 6 days and is staffed by two paid teachers, one elementary, one secondary as well as a number of retired teacher volunteers, social workers, ESL teachers and other learning support staff. The typical 5 day program is outlined below as outlined in the London Free Press article from January 27, 2016:

Day 1

- The family comes to White Oaks school where they will meet with an ESL teacher and school support worker so they can discuss what if any schooling the children have already received, their hopes or concerns about the school experience in London and any special needs their children might have for the classes they will soon begin in London.
- The parents are introduced to a receptionist (who speaks Arabic) who will register the children at the appropriate school (not necessarily White Oaks School but the one closest to where the families live).
- The children will then leave to meet with either an elementary or secondary school teacher depending on the level of school the will be attending (or, if they are very young, they may play with some blocks or other toys provided at the centre). Parents will talk with the receptionist about school back home.
- The family leaves with a backpack, an Arabic-English dictionary and information about their school, a school calendar, tips for learning and a welcome letter from the board, all in Arabic and English; they are even given information about how to pack a typical lunch box for children who will be staying at school for lunches.

Day 2

- The children begin learning activities as preparation for entry into the school where they are registered. The ESL teacher begins assessing the children for oral, numeracy and literacy levels. For children who have never attended school and who have no knowledge of English, it may be possible that they will be assessed as total beginners. The initial assessment is entered into an online ESL tracker that will be sent to the children's home school once they actually start classes at that school.

- Concerns about the child's learning that the ESL teacher and social worker have uncovered in the initial assessment are documented and sent to the home school.
- Parents who are in a separate area while their children are assessed for academic levels are able to meet counselors and there is also an area with refreshments where they can stay, socialize with other parents or read English and Arabic newspapers

Day 3

- The children work with elementary or secondary teachers depending on their age and which school they have been registered in.
- There are opportunities for families to tour White Oaks public school so that they can become a bit familiar with a typical Canadian school.

Day 4

- At this point, students meet an ESL teacher and school support counsellor from their home school (that is, the one where they are actually registered close to where they live). The ESL teachers and counsellors arrive at the GENTLE centre to meet both families and new students to their school.
- The students and parents are shown pictures of their new school, the playground, the teachers and principal on iPads the counsellors have brought with them.

Day 5 or 6

- Students and parents continue with learning activities and orientation.
- On the final day of the GENTLE program parents and students are transferred to their home school. There they are welcomed by the ESL teacher and school support counsellor they met at the GENTLE centre, and are then introduced to the principal of the school and the homeroom teacher(s) of the student(s). (Dubinski, The London Free Press, January 27, 2016a).

By May 1 after placing 467 students in 38 elementary and 3 secondary schools the GENTLE Centre closed down as the number of Syrian refugees arriving in London (over 1000 in total) had begun to dwindle. In addition to strictly educational issues, the centre with its varied staff had also been able to help parents find family doctors and dentists as well as access other community resources and services. Had the TVDSB followed its previous procedures of sending elementary newcomers directly to their assigned school and secondary aged students to the ESL high school in London, it might have overwhelmed schools receiving large numbers of students at different levels over a few weeks. Having the GENTLE Centre certainly made it easier both for the newcomers and the schools. From now on the individuals who arrive will be welcomed at the school closest to their home where they are registered, but since it will only involve very small numbers of arrivals, it should be manageable by the local school. Now that the GENTLE Centre has closed the TVDSB will be focusing on setting up ESL classes during the summer at three different locations in the city to serve refugee children from grades 1 to 8. In the past, summer ESL

programs were only for students at the grade 7 and 8 levels but with the large number of recently arrived Syrian children with no English skills, the board has decided to expand the summer ESL program to all grades in the elementary school. The GENTLE Centre has been a wonderful example of how to meet the challenges of a sudden influx of newcomers and ease them into the community in the "gentlest" possible way.

6.2.3 Language Programs for Adult Refugees

When immigrants and refugees arrive in Canada, one of the first concerns for helping them to integrate into the community is that they have sufficient command of the language (in this case English) so that they can function in the new environment. In London Ontario the CCLC has a Language Assessment and Referral Service (LARS) that arranges appointments for adults to be screened so that they can enter appropriate language classes to develop their skills in English. Because of the sudden influx of so many refugees in the new year 2016, the CCLC had to arrange for additional daily assessment to cut down the wait period and help newcomers be assigned to appropriate language classes as soon as possible.

In addition, basic English conversation circles were set up for Syrians in temporary housing. The conversation circles typically run 3 days per week, Mondays, Wednesdays and Thursdays from 1:30 to 3:00 pm where groups of from 5 to 25 people gather to speak with English speaking volunteers about basic concerns. Usually the volunteers have some past experience with ESL or are student teachers, studying ESL methods.

The London Public Library offers programs on its premises but also helps newcomers to find other language programs in the community such as Culture Works, a program offered through Western University's King's College. Success in this program permits graduates direct entry into the University of Western Ontario. The Faculty of Education through the Bridging Program provides students who have been accepted to the university but who lack enough English proficiency to succeed, intensive language courses before they enter university programs. However, both these programs require a certain fluency in English before students can enter so many adult Syrian refugees in London will not be able to access these programs in the near future. The Centre for Lifelong Learning, run by the London District Catholic School Board also offers LINC classes as well as enhanced language training to prepare newcomers to enter the workforce and some of their programs include practical experience that will give newcomers the Canadian work experience often required before they can be hired into local industries (www.cfll.on.ca).

There are several opportunities available to refugees through the government run LINC (Language Instruction for Newcomers to Canada) program. In London the adult refugees are encouraged to attend a LINC centre (usually housed in various community agencies in the city such as the CCLR office) where their English

language skills level will be assessed and then they can attend a class at their level to begin to improve their English skills. LINC is a free language training program and is funded by Citizenship and Immigration Canada. The LINC assessment and programs are developed from the Canadian Language Benchmarks (CLB), a project organized by the government to establish language standards and set up an assessment program to meet the needs of adult immigrants. The project to set up the standards began in the early 90s and is based on extensive research on language learning and proficiency levels.

Those setting up the benchmarks drew on the principles of communicative language ability, that is, a person's capacity to understand and communicate effectively and appropriately in particular social situations (CLB, 2012, p. vi). They drew on the model developed by Bachman (1990) where he defines Language Competence as being made up of Organizational Competence and Pragmatic Competence with subsections specific to elements of language. Under Organizational Competence, Bachman identified the areas of Grammatical Competence (vocabulary, morphology, syntax and phonology/graphemes) and Textual Competence (cohesion and rhetorical organization). Under Pragmatic Competence, he identified illocutionary competence (or how one uses language) including the ideational for expressing ideas and emotions, manipulative to get things done, heuristic to teach, learn and solve problems, and imaginative functions to express creativity. In addition, he outlined elements of sociolinguistic competence including sensitivity to dialect or variety of language, sensitivity to regional and national varieties and awareness of cultural references and figures of speech. (Bachman as outlined in Omaggio Hadley, 1993, pp. 7–8). Bachman had based his model on work of Canale and Swain (1980) on elements of communicative competence but had expanded their four-component model of grammatical competence, sociolinguistic competence, discourse competence and strategic competence to provide more specific details of what is entailed in language competence. The comprehensive nature of Bachman's model has made it easier to identify areas that need attention when assessing overall language competence.

One can note the influence of Bachman's model on the model of communicative language ability developed for the Canadian Language Benchmarks. In their model for assessment they attend to grammatical knowledge, textual knowledge (Bachman's elements of cohesion and rhetorical organization), functional knowledge as in Bachman's illocutionary competence, sociolinguistic knowledge and strategic competence as well as metacognitive strategies.

Any models of language competence include the establishment of various levels of language. The developers of the Canadian Language Benchmarks used the ACTFL rating scales developed by Buck et al. (1989) as a guideline for the content of their 12 levels of competence although instead of designating their levels as Novice, low, mid and high; intermediate, low mid and high; advanced and superior, they chose instead three stages of Basic, Intermediate and Advanced with descriptors for listening, speaking, reading and writing, each main stage subdivided into levels of initial, developing, adequate and fluent.

The developers of the Canadian Language Benchmarks were also concerned that their model be competency based and their descriptors underline what the learner **can do** in English. In this way one can see the influence of the Common European Framework of Reference (CEFR) (Council of Europe, 2011).

A French version of the CLB, entitled Niveaux de compétence linguistique canadiens 2006: Français langue seconde pour adultes has been developed to inform the needs of French as a Second Language (FSL) programs for immigrants in Quebec.

It is important to recognize that the CLB provide descriptive statements about successive levels on the language learning continuum in a variety of contexts as well as descriptions of performance tasks, but by necessity do not provide discrete elements nor a curriculum. Nor is the CLB tied to any specific methodology, although it does recommend "real world" communicative tasks be used to make the instruction relevant and useful in line with the tenets of communicative language teaching and the Common European Framework of Reference. The developers of the CLB acknowledge that grammar and pronunciation may require explicit instruction as they are important components of language ability but the document does not specify which grammatical elements learners should master at any given level.

Various textbooks have been developed using the CLB as a guideline such as the Oxford series *Q Reading and Writing;* the Nelson series *Pathways Listening and Speaking,* and *Pathways. Making Connections* to develop reading skills.

Many of the Syrian refugees in London have no workable knowledge of English at all and if they have never attended school may have no literacy skills to draw upon when learning to read and write. As such, they will enter programs at the CLB levels one to four. At this level they will be learning enough to be able to communicate in predictable contexts about basic needs, common everyday activities and familiar topics of immediate personal relevance or in other words survival language in non-demanding contexts of language use (CLB, p. x). For those at a very basic level with little schooling behind them in their native country, they may need to be instructed on learning skills in order to help them to succeed at learning their new language.

It should also be noted that it is common for language learners to be at different levels for different language skills, such that they might be at level 4 in speaking but only level 1 or 2 for writing. The Centre for Lifelong Learning offers 9 week sessions of ESL classes for adult immigrants and refugees for levels 1 through 7. Classes meet for 1.5 h per day morning and afternoon as well as 3 h evening classes for those who are otherwise engaged during the day two nights per week. Since further training for the job market or for certification in a trade may require the Ontario Secondary School Diploma (OSSD) or its equivalent, immigrants and refugees may also take courses to gain enough credits in various subjects to qualify for the OSSD (CCLR brochure, January 2016). Depending on the background and aptitude of immigrant and refugee students, it may take more than 9 weeks to complete a level.

Personal communication from a local ESL instructor at a community college revealed that in order to take ESL classes at a community college, students must be at level 4 at least. That cuts out the majority of recent Syrian immigrants to London

who will need to take more basic language classes through the government run LINC program in community agencies such as the Cross Cultural Learner Center, or the Centre for Lifelong Learning, or in local community centres, churches, mosques and synagogues. Those who wish to enter university programs must be at level 5 or higher in the CLB continuum and have passed the level 5 test with a grade of 80% if they wish to enter university or 70% to enter programs in a Community College. According to the CLB document, the intermediate language levels 5–8 display the ability "required to function independently in most familiar situations of daily social, educational and work-related life experience, and in some less predictable contexts" (p. X). It may take many of the adult Syrian refugees more than 2 years to reach this level of language competency. Few adult refugees will reach Stage III, levels 9–12, which is described as language ability "required to communicate effectively, appropriately, accurately and fluently about most topics in a wide range of contexts and situations, from predictable to unfamiliar, from general to professionally complex and from specific to nuanced in communicatively demanding contexts" (CLB, p. X). In fact, like the superior level of the ACTFL scale, levels 11 and 12 of the CLB may involve language ability beyond many native speakers who do not have advanced education. For this reason, newcomers are usually satisfied if they can demonstrate proficiency at levels 8 or 9. However, it will take time for them to reach that level of language ability.

6.3 Conclusion

If we consider Cummins' (1979, 1981) well-known contention about BICS (Basic Interpersonal Communicative Skills) and CALP (Cognitive Academic Language Proficiency) that to function comfortably in an academic environment, language students would need 5–7 years of study, it is clear that those adult refugees who aspire to entering university to gain some kind of academic credential will need considerably more time than allotted to have the language skills to succeed. However, Cummins has also noted that after 2 years of immersion in the environment where the language is spoken (that is, where refugees are living in an English environment and taking classes to improve their language skills), most will be able to function comfortably for everyday activities. With that level of proficiency, they should be able to take advantage of employment training programs that will assist them in finding permanent employment. The positions will most likely be low-level unskilled jobs, but at least it will give them a start. The problem is that currently refugees receive only 1 year of government support before they are expected to be able to integrate into the community, find employment and get on with their lives. That most certainly will not be long enough for the majority. Those who are privately sponsored may be in a more advantageous situation as many of the sponsors have said they are in this for the long haul and are provided to be there to assist the families as long as it takes with financial support as well as other resources. As has been the case in the past, it is probably true that for the adult

refugees who have just arrived in Canada, their lives will be difficult and they may find it very hard to ever fit in. For their children however, it will be a different story and after only a 1 or 2 years, they should be right at home, comfortable in using their new language as well as their mother tongue and identifying as Canadians. That has been the pattern of past refugee and immigrant groups who arrived on our shores: the first adult generation sacrifices a great deal and never really fits in; the children and subsequent generations accommodate themselves very well to the new environment and become part of the multicultural mosaic that characterizes the Canadian identity.

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Chapter 7
The Impact of Social Networks on Student Motivation and Achievement

Sharon Tzur, Adi Katz, and Nitza Davidovitch

Abstract The last two decades have seen the emergence of social-technological networks, which have changed the teaching methods and technological learning techniques. Social networks, learning technologies, and digital teaching tools are gradually becoming major work tools, integrated in the different educational systems. The integration of digital technologies has changed the classical face-to-face classroom study space and transformed teachers and lecturers into figures that guide, direct, and mediate between the students and the study contents by means of an array of teaching methods. The research literature indicates a growing awareness that significant learning among students originates not only from an authorized external source such as a teacher. In fact, most students derive information also from their peer group, while conveying information collaboratively. There are several methods of collaborative learning, the most central of which are social networks. In addition, studies conducted in formal and informal learning environments show that formal learning is only a small part of one's learning experience throughout life. The role of formal learning in imparting academic knowledge is only about 19% until the end of high school. A review of the research literature indicates an association between the contribution of social networks to social-academic interaction and the impact of both on learning motivation and academic achievements. Using the review, we constructed a model containing several dimensions, in order to produce a proper structuring of the elements involved in using interactions on social networks as an academic and pedagogical tool for improving motivation to learn and academic achievements. Our model may serve as a tool for decision makers and for future studies in the area of social networks in educational systems. The model can support for enhancing social and academic interactions, for improving student achievements and for creating a technology-supporting class climate. The review and the model

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have considerable significance in light of the growing entrance of technology to all areas of our life and particularly education and teaching, as well as to understand how social networks contribute to classroom climate, while charting the necessary social and emotional needs and how to increase the efficacy of this social technology in order to meet these needs.

Keywords Academic achievement · Constructivist approach · Digital teaching tools · Facebook · Extrinsic motivation · Intrinsic motivation · Smartphones · Social-cultural context · Social interaction · Social networks · Technological environment · WhatsApp

7.1 Introduction

The last two decades have seen the emergence of gradually more digital technologies, changing the manner of teaching in the classroom and transforming the teacher into a figure that mediates, among other things, between the study contents and the learners, by means of technological learning methods. The academic arena has been affected by the development of web-based study platforms. More and more educators are using online technologies as a means of communicating with their students. Learning in the technological era is strongly affected by the integration of technology both in study methods and in student-student and student-teacher relations (Waldman, 2007; Nachmias & Mioduser, 2001). Studies conducted in the area of learning in formal and informal environments indicate that formal learning is only a small part of one's learning experience throughout life. In addition, various studies have shown the ability of learning systems to improve learning processes and learners' achievements (Joubert, 2013; Laborde & Straesser, 2010), where the main goal of online learning environments and practice is to help the learner understand a certain subject or achieve a certain educational goal, while placing the learner at the center of the experience (Cicognani, 2000).

The COVID-19 crisis strongly affected educational institutions around the world and created a major upset. The pandemic compelled elementary, secondary, and higher education institutions to remain closed temporarily, and face-to-face teaching came to a complete stop. Educational institutions found it very hard to deal with the challenging situation, so in addition to arguments supporting e-learning such as accessibility at any time and place and flexibility in guidance times, an added argument in favor of e-learning is that it allows a realistic way of providing a response in times of crisis. The combination of face-to-face lectures with technology-supported teaching might generate involved and collaborative learning. This type of learning environment can even increase students' learning potential and stimulate the development of new skills that will support learning processes throughout life. The COVID-19 crisis caused governments worldwide to recognize the increasing significance of e-learning in a dynamic world with various scenarios and elements of uncertainty (Dhawan, 2020).

Meaningful learning among students is afforded at present not only by an authorized external source – a teacher, counselor, or literary-bibliographic source. In fact, in many cases students derive knowledge from their peer group, while conveying information collaboratively. Varied interactions in a social-cultural context are a basic need of learners. Social interaction is an initial stimulant that facilitates and urges cognitive and intellectual development among learners (Vygotsky, 2004). In addition, there are several ways of learning collaboratively, and one of the major ones is through social networks (Adani et al., 2012). Collaborative learning also develops students' intrinsic motivation. Students learn to be part of a team, assuming responsibility for the success of the group and for developing a sense of pride in its achievements (Gregory & Kaufeldt, 2015).

Social relationships that support perceived efficacy, autonomy, and belonging are a foundation of intrinsic motivation and of strengthening self-direction with regard to extrinsic motivation in school. Self-study requires classroom conditions that support three basic human needs – a sense of belonging, effectiveness, and initiative (Adani et al., 2012). When students feel that studies are interesting and meaningful they feel a strong sense of gratitude and belonging to the school (Adani et al., 2012). Therefore, situations of intrinsic motivation, which can certainly be individual, have a considerable contribution to improving the atmosphere and social belonging to educational institutions (Bromberg-Martin et al., 2010). Social relationships give students a sense of confidence both in general and with regard to learning. Collaborative learning generates social learning, proven to be a motivator. While studying in a group, students do their part and also benefit from their peers. They take responsibility for the group's success from a sense of team spirit and belonging to the group (Strauss et al., 2017). The purpose of the literature review is to generate a model addressing the contribution of interactions on social networks to motivation and to academic achievements while creating empowerment and intrinsic motivation among students by using social networks and thus increasing their involvement, first as members of the group and at a later stage as leaders.

7.2 Literature Review

7.2.1 Learning

Learning is the process of acquiring, expanding, or improving knowledge, understanding, abilities, or skills. In this way learning can be described as a change or growth in any area. Learning is an internal process involving a relatively stable change in one's behavior, one that cannot be observed directly and is therefore defined by its outcomes, manifested in behavior. Learning is based on experiencing and leads to a relatively permanent change in one's behavior or potential behavior (Kaniel, 2006).

7.2.2 Distance Learning

Distance learning is a relativity new accessible and achievable learning environment in the web-based global arena, one in which learning flow and sources are accessible, a wealth of learning opportunities are provided, and learners can independently control the learning time, location, and content. In distance learning, the teacher-student interaction changes – both synchronous and asynchronous learning are possible. The key to e-learning is that each person can enhance his or her abilities at any given moment and not only in a certain time, such that the learning process takes place anywhere and anytime (Resta & Shonfeld, 2013). Interactions on social networks enable distance learning independent of geographic location and learning at any time.

7.2.3 Learning in a Formal and Informal Environment

Studies on learning in formal and informal environments indicate that formal learning is only a small part of one's learning experience throughout life: The role of formal learning in delivering and mediating academic knowledge is about 19% until the end of high school, dropping to 8% in undergraduate studies and 5% in graduate studies. As students' progress from high school to adulthood and graduate school, the role of informal learning becomes more and more important, as learning can occur anywhere and at any time. Learners acquire knowledge as a function of interactions between partners and among classmates, as interactions allow learners to upload questions, contents, and assignments on the web. Social relationships as manifested on social networks change our ways of thinking about knowledge and learning as well as training in the modern work organization (Chen & Bryer, 2012).

7.2.4 Meaningful Learning and Collaborative Learning

The main pedagogical approach underlying e-learning, which emphasizes the transformation of the learner into an independent and active individual and changes the teacher's role, is the constructivist approach. The main principle of this approach is that knowledge is constructed and not conveyed. This approach to learning is considered as one that leads to meaningful learning, where learners process information absorbed in the learning process, and the focus is on students who learn rather than on teachers who teach (Yechiel, 2008). According to Carmi and Buchnik (2012), the constructivist theory transforms direct delivery of the meaning of knowledge into creating conditions for constructing meaning by the learners. It creates a shift from the teacher's understandings to self-formation of understandings by the student. Therefore, the teacher is not the main source of knowledge and even

does not impart knowledge, rather students construct their knowledge in various ways such as by asking questions, gathering information, operating skills, and forming connections between all the elements. The teacher's role is to guide and enhance student motivation and ability to learn and develop by means of questioning and support (Koohang et al., 2009).

Meaningful learning by students comes at present not only from an authorized external source - a teacher, guide, or literature source. In fact, in many cases students derive information from their peer group, while holding discussions and conveying information collaboratively. Hence, this type of learning is called collaborative learning. There are several methods of collaborative learning, and one of the most central is through social networks. Collaborative learning relates to integration between the learner's knowledge and the environment. This learning allows learners to express themselves in a group, organize their knowledge before it is written down, and also form social ties. The very act of collaborative learning may be more beneficial for students than learning through a single expert such as a teacher (Adani et al., 2012). Collaborative learning develops students' intrinsic motivation. Students learn to be part of a team and to take responsibility for the success of their group and develop a sense of pride in its achievements. Collaborative learning and teamwork generate significant learning that arouses interest, inquisitiveness, and encourages higher order thinking: critical and creative thinking. Collaboration between learning-oriented students grants each student a sense of involvement and significance. This basic foundation arouses students' motivation and their desire to succeed, such that they will be willing to make efforts and to persevere in their learning (Gregory & Kaufeldt, 2015).

There are two dimensions of teaching that are important for the success of learning and that can also be used to classify the types of interactions on social networks: One is the cognitive dimension, comprised of the students' ability to organize the course and the lesson and to utilize the time for learning, make clear explanations of the material studied, and maintain concentration and involvement in the lesson. The second dimension is the affective dimension, comprised of the teacher's ability to show respect for the students, empathize with their difficulties, care about their success, and help them to attain it. This dimension also encompasses positive and beneficial interactions in class, including encouraging students to ask questions and providing useful answers to these questions (Hativa, 2015).

7.3 Motivation and Empowerment

7.3.1 Motivation

Motivation is a psychological process that causes arousal, direction, and perseverance in voluntary actions directed at attaining a goal. The concept of motivation relates to the desire to invest time and effort in a certain activity, even when involving tribulations, a high cost, and lack of success. There are two types of

motivation: intrinsic and extrinsic (Richard & Deci, 2011). **Intrinsic motivation** relates to motives that are connected to the person or the action taken. Intrinsic motivation is considered, in general, a more stable type of motivation. From birth and onwards people are active, inquisitive, and exploring creatures, who demonstrate general willingness to learn and do not require external incentives to do so (Levoy, 2008). **Extrinsic motivation** relates to motives associated with the environment, which do not depend on the individual, or motives associated with factors that are not linked to the action, such as the wish to be rewarded or to avoid punishment. Use of extrinsic motivation such as the granting of a prize has a short-term effect, and creates learning that lacks meaning, such as rote learning. When people are intrinsically motivated, they carry out an action in order to enjoy the action itself (Lavie, 2000). Social relationships that support the sense of efficacy, autonomy, and belonging, are the basis for intrinsic motivation.

When students feel that studies are interesting and meaningful, they experience a strong feeling of gratitude and belonging to the school (Adani et al., 2012). Therefore, situations of intrinsic motivation, which can certainly be individual, contribute strongly to improving the atmosphere and to a sense of social belonging to educational institutions. At present, the main way of forming social relationships is through the social networks, therefore it is an important tool also for creating intrinsic motivation among students.association between intrinsic motivation and the interpersonal and social climate at school is extremely important, as it shows that promoting intrinsic motivation is important not only for those interested in students' learning or personal development, but rather also for those interested in their social development (Bromberg-Martin et al., 2010). Bromberg-Martin et al. (2010) found that students motivated by extrinsic motivation will make relatively simpler tasks and will be ready to invest less efforts in the learning procedure than students with intrinsic motivation, who will undertake more challenging tasks and will have higher motivation. In addition, students with intrinsic motivation who enjoy learning, will try to find similar students in order to develop studying relationships with them, which can then evolve into social relationships.

An important aspect for advancing students in an online environment is the emotional aspect. Many students may experience difficulties with learning processes because they lack motivation or do not have the necessary self-confidence in order to apply the skills they acquired. When students feel a lack of confidence or sense a lack of belonging or attachment to the other students, they will not be available for learning. They will be occupied with possible threats to their safety and with the need to establish satisfying relationships and will not be open to seeing the interesting or important aspects of the subject studied. **Intrinsic motivation** makes learning efficient and encourage students to persevere in concentrating and in carrying out actions towards attaining their goal (Van Rosmalen et al., 2016). In addition, students that lack motivation or sufficient self-confidence have a considerable difficulty to curb irrelevant associations and focus on the current problem (Hannula, 2006). Therefore, it is most important to strengthen their motivational-emotional dimension and raise their self-confidence, so that they can better realize their understanding of the material studied (Ross et al., 2016).

Social relationships grant students a sense of confidence both in general and in the domain studied. When students feel included and part of society and are not busy with concerns of being hurt or denigrated, they can engage in learning and promote themselves to succeeding. In group learning students do their part and are also sustained by their peers, they take responsibility for the group's success based on team spirit and a sense of belonging to the group (Strauss et al., 2017). According to Maslow, human beings are highly motivated by the need for fulfillment and change through personal growth. This growth, which is at the tip of Maslow's pyramid, is usually achieved by empowerment, and therefore this theory has many educational applications in teaching and in the management Many motivation theories are based on Maslow's pyramid of needs, published in 1943, where he explains human activity as motivated by basic human needs that must be met. He also distinguished between physiological needs, safety needs, emotional interpersonal belonging needs, and needs for prestige and self-fulfillment. Many researchers agree that human needs are the key to understanding human motivation but disagree as to what are the needs, how they motivate people to act, and what role society plays in the individual's ability to meet them. Many researchers claim that the means for fulfilling all the needs are always social (Mrushk-Klarman, 2007).of school classrooms. The teacher has a central role in creating self-fulfillment in students by giving self-confidence and a sense of competence and this can also be done by using social networks (McLeod, 2020). Maslow's pyramid of needs is portrayed in Fig. 7.1.

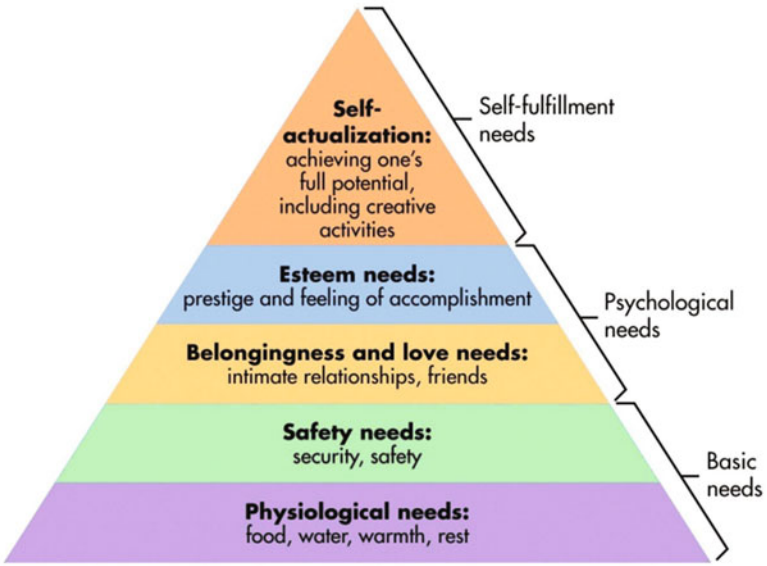

Fig. 7.1 Maslow's pyramid of needs. (McLeod, 2020)

7.3.2 *Empowerment*

Empowerment is the process in which the mainly internal strength (power) of the individual or organization is developed and acquired. There is a relation between individual empowerment and collective empowerment. When people collaborate with each other to form their own social rules, opportunities for personal and collective empowerment can emerge. Empowerment is often achieved by a communication process among people in small groups. Studies reveal important insights regarding the communication aspects of empowerment. For instance, empowerment is described as an internal process that allows people to attain control of issues that occupy them. People gain faith in their power to attain desired goals by talking to others, particularly colleagues. Sometimes groups of people must be organized by a coach who can subsequently retreat, while the group hopefully forges on. When people rally around a common goal, opportunities arise for collective learning, mutual support, and group efforts. In a group, the vulnerability of an individual is reduced by the strength of many (Aldoory, 2003).

Henry et al. (2012) conducted a comparative study to examine an empowerment model for students on the internet with regard to reading, writing, and communication. Through focused technologies and peer instruction, mutual e-learning was designed to support the development of literacy involving e-reading comprehension among junior high students. The results show that peer collaboration was the main means of strategy exchange, leading, and sharing new strategies. In fact, peer collaboration managed to instill a new spirit in struggling readers and set the context for more involvement in literacy activities and investment in learning and was found to be the most meaningful cause of empowerment in learning.

Another approach to student empowerment is the humanistic approach proposed by Rogers (1951), who contended that the main human motive is the wish for self-fulfillment. According to Rogers. psychological problems are created due to incompatibility between the "ideal self" and the "actual self". This incompatibility between the desired and the actual can be avoided by education that emphasizes unconditional acceptance, namely the willingness to accept one's feelings and emotions as legitimate. In his treatment method, Rogers avoids using objective information received from tests and establishes his doctrine on the following principles: respecting and appreciating the client; encouraging the client to understand himself; focusing on the here and now and relating to the emotional domain. Humanistic psychology is also manifested in the educational field, by relating to the emotional domain no less than to the cognitive domain. The emotional domain was subsequently designated the "phenomenological field", which constitutes all the individual's experiences at any given moment, i.e., the subjective inner world (Feldman, 2018).

7.3.3 *Positive Psychology*

Positive psychology is a relatively new branch of psychology that appeared in 1998 and it focuses on strengthening positive sides and not only correcting negative sides. Positive psychology strives to contribute to mental health by positive exploration of emotions and psychological forces. The emphasis in positive psychology is on flourishing, meaning, and virtues, and it is consistent with the ethos of education in the twenty-first century that focuses on strengthening self-efficacy and self-confidence rather than evaluation (exams and tests). The purpose of positive psychology is first and foremost to nurture positive feelings, positive behaviors, and positive cognitions (Waters, 2011). Skills and thoughts that promote positive feelings also affect learning and success in one's studies. Growing research evidence shows that student well-being is positively related to academic achievements. Among students from preschool to high school, students who participated in a social and emotional study program achieved a higher mean score on achievement tests than students who did not take part in such a program (Waters, 2011). Positive psychology has a strong effect on student achievements, and therefore components of positive psychology such as optimism and expectations for achievements and for attaining goals can also help explain motivation and academic achievements (Pajares, 2010).

Optimal experiences occur within a sequence of goal-directed activities restricted by rules and that require mental energy. An optimal experience is produced when people report feelings of concentration and deep pleasure. What makes an experience satisfying is a state of consciousness called flow, a state of concentration and complete control of activity. Every person experience flow from time to time and will identify the same features: People usually feel strong and confidence in their ability to complete the task, alert, act with no effort and with a sense of personal control over the situation, and are unselfconscious. When we are in a flow mode, our sense of time and emotional problems also seem to disappear, and there is a feeling of uplifting. An optimal experience describes the pleasure of controlling the event and not only leaving it to chance, being challenged with tasks that are not too hard and not too easy for our abilities. With such goals, we learn to invite the information that enters our consciousness and thus improves our quality of life (Csikszentmihalyi, 1990). An experience of optimal learning should generate flow and pleasure, with challenging but achievable tasks.

7.4 Social Interaction

Interaction is defined as a process that involves various forms of communication. Each interaction contains at least two complementary interrelated events that occur between two objects, and its main purpose is to change the student's educational behavior and bring the student closer to the learning goal. The result of the

interaction is to learn some content or receive emotional benefits. Students normally will not approve an interaction unless they receive feedback. Interaction represents an event, i.e., communication that occurs between two people; this might occur synchronously or asynchronously while utilizing technology and providing a comment or feedback (Srecko et al., 2015). Vygotsky (2004), among the pioneers of the social-cultural approach, criticized the theory of the Swiss developmental psychologist Piaget, whose method focused only on the individual's mental activity and was perceived as individualist. Vygotsky claimed that the social context where the learning occurs has a much greater weight than that indicated by Piaget's theory and therefore he investigated the impact of social and cultural interactions on mental development and cognitive functioning in general and on learning processes in particular. Vygotsky believed that diverse interactions within a social-cultural context are a basic human need. Moreover, according to Vygotsky, social interaction is the primary stimulant that facilitates and urges cognitive and intellectual development among humans (Vygotsky, 2004).

7.4.1 The Effect of Social Interactions During Learning on Academic Achievement

With the development of technology in the last two decades, and particularly the connection to the internet, a wide range of interactive learning opportunities was formed. Student-teacher interaction has become a primary component of distance learning and allows the student to communicate with other students or with the environment, unrelated to the discipline. Many researchers see interaction as the most important component of any learning environment and therefore the significance of interactions, both in traditional learning and within online education, has been explored over a lengthy period. A study that included 6562 junior high students, conducted in South Korea by Eunjin and You-kyung (2018) examined the effect of social relations and social values in a learning context and how these values predict achievements in school. The research results stressed the essential role of interactive and social relationships between the students on academic achievement. The study found that low social intrinsic value led students to low academic achievements even though their academic intrinsic value (self-efficacy) was high. The study recommends that teachers and parents provide experiences that support relationships among the students and thus increase the likelihood of high motivation to learn. Rappel (2017) examined the role of self-control and self-direction in e-learning by combining elements of personal and collective involvement. His conclusion was that e-learning is based on social aspects of learning, namely it encompasses collaborative learning affected by the relationship between peers and the learning process.

7.5 Learning in the Digital Arena

In the two last decades, gradually more information and communication technologies (hereafter ICT) are being utilized, changing the manner of teaching in the classroom and transforming the teacher into a figure that, among other things, mediates the technological learning methods to the students (Waldman, 2007; Nachmias & Mioduser, 2001). These digital teaching platforms have become a major tool to a gradually growing extent in the various educational systems and are integrated in schools, colleges, and universities (Nachmias & Mioduser, 2001). The e-learning environment has unique aspects and emphases with regard to the learner's pedagogical and personal conduct. This learning is particularly important for members of Generation Z, who were born from 2000 and onwards directly into the technological progress, where a major part of their life takes place on social networks (such as Twitter, Instagram, WhatsApp, and Snapchat). Hence, use of an online environment is the very air they breathe, as they are unfamiliar with any reality that lacks online conduct. In order to activate learning activities for this generation, they must take place in the learners' natural environment, i.e., the online environment (Rotem & Peled, 2008).

Distance learning and distance education have a fairly lengthy history. In the mid-twentieth century several schools in the UK planned new types of open courses in various fields with the purpose of creating an alternative for traditional face-to-face education, designated particularly for those who could not study in schools for social or financial reasons. Indeed, these programs allowed a significant increase in the number of students and offered mass education for the first time. Since 2012, various programs in the UK have enabled the acceptance of an unlimited number of students and made it possible for adults and employees to participate in specific courses through distance learning or blended learning – online and face-to-face learning, such as MOOC (massive open online courses). The COVID-19 pandemic led to the closure of schools and universities in many countries for various periods and distance learning and distance education often seemed the only way of ensuring continued education and learning by students in all school grades and at universities. Most of the activities were carried out on electronic learning platforms or applications allowing learning via video communication, such as Zoom and Google Meet. In certain countries, the availability of digital tools and virtual devices and programs, as well as training programs for teachers, made it possible to rapidly continue the learning process (Domenici, 2020).

Nowadays, information technologies, digital communication, and social networks have a considerable effect on behavior, especially of young people whose main part of their lives is on social networks. These diverse media mean make it possible to develop networks of social connections that afford active and collaborative social learning (Almeida et al., 2013). Technology has an important role in affording focused and personally adapted learning opportunities at any time (Kidd & Chen, 2011). Various research findings have shown the ability of ICT learning systems to improve learning processes and learners' achievements (Joubert, 2013;

Laborde & Straesser, 2010). The main goal of online learning and practice environments is to help the learner understand a certain topic or manage to attain a certain educational goal, while placing the learner at the center of the experience (Cicognani, 2000). Learning environments based on computer technologies that provide tools for teaching, course management, and practice also allow teachers and lecturers with no significant technological background to build course websites and increase the efficacy of teaching among lecturers and of learning among students (Romero et al., 2008). It is commonly accepted that in the ICT environment, students also help each other more than in the past, despite the fact that it is a virtual forum rather than a tangible face-to-face discourse. They themselves become instructors on topics related to technical aspects (operating the system, installations, etc.). Moreover, they support and utilize each other's help to create emotional "harmony" and reciprocity that they so lack in the "online loneliness trap" (Nir Gal, 2000).

7.5.1 Levels of Social Participation with Technological Mediation

Billions of people all over the world participate in online social activities. Preece & Shneiderman, (2009) divide the level of involvement into four categories: users who participate as **readers** of discussion boards, seek and mine data, and look at pictures. Some users become **contributors** of content formed by users, such as writing criticism, uploading pictures, and sending materials to group members. Some users become **collaborators** by individual efforts, such as creating groups with vibrant discussions in a joint effort to solve a problem. A major component in forming collaborations is trust and empathy among group members. A small part of the users become **leaders**, such as by setting policy and maintaining it, correcting materials, or guidance. Online leadership is very different from leadership in face-to-face communication and on the web, it is usually characterized by the largest number of comments, where 10% of the group members contribute about 90% of comments and materials. Group leaders will make an effort to guide the rest of the members, solve problems, take responsibility, and volunteer for assignments. It is possible to move from one category to another, to more active or less active participation, in both directions, and also to skip stages, meaning that it is possible to contribute to a group and then be a leader (Preece & Shneiderman, 2009). Learning in a technological environment of involvement and creativity allows users to be more active in the learning process and tempts users to collaborate (Chen & Bryer, 2012). Schools and academic institutions should address the role of the teacher in the group, and consider the option that the teacher will not always occupy the role of leader, but allow information flow in order to let the students express themselves and ascend the stages of the model. We will deal with this question below, in the model proposed in this paper.

It is possible to divide the topic of learning via technology to several concepts – **"computerized learning"**, which is the use of computerized means for the purpose of learning, **"digital learning"**, which is the overall pedagogic means applied through information technology and media in order to enhance learning, and **"ICT learning"**. ICT learning utilizes a computer connected to internet or intranet media. This type of learning usually takes place with the learner and teacher separated by time and place and it allows learning flexibility and the ability to reinforce learning processes through new opportunities that technology offers to the students (Beetham et al., 2013).

7.5.2 Use of Smartphones as a Learning Tool

The integration of mobile learning (M-learning) via smartphones in teaching, facilitates accessible and available learning and provides tools and applications that enable dynamic and experiential learning in varied ways and methods suited to the differences between students and specific fields of interest. In addition, these technologies are tools that contribute to complementing and expanding the natural abilities of the human mind in processes related to knowledge, thinking, learning, and problem solving. Knowledge technologies provide access to information and enable its processing and storage, its transference to others, and transformation into knowledge. Smartphones currently have a meaningful contribution to information processing and the transformation of information into knowledge. This technology supports information processing in three ways: (1) Promoting information consumption due to access to information anywhere and anytime; (2) Creating information due to diverse applications for processing and storing information; (3) Telephones that constitute a communication channel facilitating both accessibility to information received from other users and spreading information to others. Smartphones constitute a technological means for creating interaction between users in many ways: speech, video conversations, instant texts, and asynchronous communication. The abundant means of communication can be utilized for the purpose of learning in many ways. One of these is maintaining alternative communication channels for face-to-face communication in the classroom (Backchannel) through social networks such as Facebook and WhatsApp (Meishar-Tal, 2016).

7.5.3 Social Networks as a Learning Tool

As social media expands everywhere among millennial learners, educators are seeing the potential advantages of using these tools for academic purposes. Regretfully, there is little research on how social media affects a students' learning experience. In a study conducted by the EDUCAUSE Center for Analysis and Research in United States, more than 90% of the students reported that they use

social network services, however less than 30% of the participants reported such use for a course during the quarter or semester. The limited educational activities on social media platforms include forming study groups and other interactions with classmates without the teacher's knowledge, "post-hoc" criticism of learning experiences and events, reading internet resources with little evidence of critical investigation of analytical consciousness, file sharing, playing games, and having short communications (Chen & Bryer, 2012).

Using social media as a learning tool might connect informal learning with the formal learning environment. For example, third party social media tools might include peers from outside the class beyond the duration of one semester and connect learners to communities, experts in the field, and colleagues from around the world. Social media also provides fascinating channels for easing interactions between students in multimedia formats. In addition, social media technologies that allow students to connect with educational contexts in new and meaningful ways beyond the traditional classroom environment have the potential to blur the boundaries between formal and informal learning (Chen & Bryer, 2012). Social networks make it possible to transform the classroom into a supportive "community of learners", as students can maintain communication in this group from anywhere and anytime, share their knowledge with each other, and support students with difficulties. They allow maintaining collaborative learning processes between lessons and make learning more continuous (Meishar-Tal, 2016).

7.5.4 Applications on Social Networks

Social media and various social media platforms influence one's evolving cultural identity. Facebook is popular social network with more than 2 billion users worldwide. Facebook boosts more than 100 million followers in one year, and it is one of the fastest-growing and best-known sites on Internet these days. The network was established in 2004 by Mark Zuckerberg first for college students and later developed into a worldwide network that allows for social interaction mainly due to the information sharing mechanism and the convenient ability to respond in several ways such as Like (Putri & Aminatun, 2021).

Twitter is a social media platform that shapes an evolving social structure. This communication platform has 1.3 billion accounts and 336 million active users posting 500 million tweets a day. Twitter users can post comments known as "tweets. Unless the tweets become private, they are available to the public and Twitter users can react to the tweet and their involvement in the tweet by sharing it on their profile (retweeting), clicking the Like button, tagging someone's username or commenting to the author of the tweet. (Karami et al., 2020).

Tik Tok is a micro-video sharing platform that allows users to create short videos that last from a few seconds to a few minutes and then share them with the wider tic-tac-toe community. The app was launched in 2017 and is the fastest growing social media app in the world, at the top of the 'Most Rebels' table in the US in 2018. It is

currently available in more than 150 countries. Tik Tok has more than 500 million active users with more than a billion downloads. Other than social media, Tik Tok is characterized by short micro-videos with easy-to-use editing and music integration functions (Chengyan et al., 2019).

Instagram is a social networking app designed for sharing photos and videos from a smartphone. Similar to Facebook or Twitter, anyone who creates an Instagram account has a profile and news update. When posting a photo or video, they will be displayed on their personal profile and other "followers" users will see the "posts" posts on their own "feed" page. Instagram is reminiscent of a simple version of Facebook, with an emphasis on mobile use and visual sharing. Just like other social networks, one can interact with other Instagram users by following them, comments, likes, tagging and private messages. (Moreau, 2018).

WhatsApp is an app for smartphones, intended to convey instant messages. One of the unique abilities of this app is communicating in a group. WhatsApp is free of charge, works on extensive platforms, and is widely used by students of all ages to send multimedia messages such as pictures, videos, audio, as well as simple text messages (Gon & Rawekar, 2017). In addition, in recent years the popularity of this app has skyrocketed, including managing student groups with and without a teacher, and it is used to convey a large part of the occurrences in the classroom arena, including messages and contents (Deshen et al., 2014). The evolvement, contribution, and formation of the WhatsApp technological platform in education institutions have yet to be intensively investigated and its outcomes have not been explored over the years on a systemic level.

In a study conducted in the United States by Taylor et al. (2012), questionnaires were distributed to 1376 students aged 18–50 in order to explore their experience with studying on social media (Facebook and Twitter) and examine whether this improves their comprehension. The results indicated positive attitudes to studying on social media, where women responded more positively than men, Probably due to the need for higher social affiliation. Another study conducted in the United States by Chen and Bryer (2012) examined use of social media among faculty in public administration fields. Eight instructors participated in telephone interviews on their experiences and perceived use of social networks for teaching and learning. The research results showed that it is possible to assist informal learning via social media by using instructors and to combine formal learning environments for enriched discussions. The study provided support of social learning theories while proposing strategies and examples of how social networks can be used to connect instructors and learners.

Class communication in joint teacher-student WhatsApp groups is a relatively new topic that has yet to be investigated in depth. A qualitative study conducted by Deshen et al. (2014) included semi-structured in-depth interviews in order to understand the phenomenon of WhatsApp use by teachers with the groups they teach. The interviews asked questions on teachers' motivation to open a WhatsApp group for their students, descriptions of activity in the group, the advantages and disadvantages they see in the group's conduct, and their main insights from the experience (Deshen et al., 2014). The interviews depicted technical advantages, mainly the

app's simple operation, the negligible cost, the privacy maintained in the group relative to social networks, and the fact that the teachers as well as their students use the app for personal needs. All these affected their choice of WhatsApp. Finally, academic advantages were presented. Unlike other classroom technologies – that often have technological faults, when sending study material on WhatsApp it reaches everyone immediately. The availability of the teacher for questions has the potential to change the study process. WhatsApp allows learning beyond the boundaries of the classroom, and the ability to correct students' mistakes immediately is significant. Most of the teachers said that occasionally they are inundated by messages, in a way that also bothers them and causes overload. Some of the teachers were also disturbed by messages sent late at night. At the same time, the teachers suggested ways of coping with these problems (Deshen et al., 2014). The conclusions of the interviews conducted among teachers who use WhatsApp as part of the educational and academic process with their students, raised a diverse portrait of educational and pedagogic goals and varied manners of implementation. The WhatsApp groups serve at least four goals: communication with students, building the atmosphere and sense of belonging in class, forming a dialogue and sharing among the students, and a platform for studies. The teachers thought of implementing one or two goals but found that the other goals were also implemented. Therefore, the first conclusion of their study is that it is important to find a way to further establish a dialogue between teachers in order to facilitate the transfer of ideas and suggestions, enable consultations and coping with the challenges formed by use of the app, and expand and enhance how the app promotes educational and pedagogical school goals (Deshen et al., 2014).

In another study conducted in the United States by the researchers tried to evaluate the impact of WhatsApp communication for conveying knowledge to students, and to compare the improvement in students' knowledge on medical topics such as infections and tuberculosis. The study was conducted by dividing the participants into 2 groups of 40 students each, where one group studied face-to-face and the other via WhatsApp exclusively by means of short videos, audio segments, and sending study material. In addition, the group that studied on WhatsApp alone participated in interactions consisting of asking questions and sharing knowledge in order to understand the material, between the students and lecturer and among the students. Knowledge evaluation was carried out by a test with 20 questions, and the perception of studies tested a feedback form (questionnaire). The research results showed that those studying through WhatsApp as a learning tool achieved identical scores, with no statistically significant difference. The main conclusion of the researchers was that constant availability of the instructor, as well as the possibility of studying anywhere and at any time, had transformed WhatsApp into a new and convenient tool for integration in teaching and in studying.

Another qualitative study conducted by Rivka with high school students indicated that there are two types of WhatsApp groups: one is oriented towards technical-academic information and its purpose is only to convey study material and technical messages. The second is oriented towards social-academic information and its

purpose is to enhance learning. While members of the technical-academic WhatsApp group claimed that WhatsApp reinforces the teacher's authority, most of the social-academic WhatsApp group thought that it weakens the teacher's authority. In addition, most of the students said that WhatsApp undermines the teacher's authority in the virtual arena more than in the classroom arena due to the lack of physical authority, disrespect for written discourse, the technical possibility of easily objecting, and easier utilization of group pressure on WhatsApp than in the physical classroom (Prince-Meller & Lev, 2018).

7.6 A Model of Student Motivation and Academic Achievement When Interacting on Social Platforms

As presented in the research literature, meaningful learning is achieved via a wide range of means. We focus on social technologies that evolved in the last two decades as means to promote motivation and achievements. We offer a model of student motivation and academic achievements when interacting on social networks, which includes several dimensions. The model is aimed at forming proper structuring of the elements involved in using interactions on social networks as an academic and pedagogical tool for improving motivation to learn and for reaching high academic achievements. Figure 7.2 shows the model in its concise form.

The first stage in the model describes the methods and tools used, particularly in the two last decades, and includes available and accessible technological tools such as smartphones, PC/laptop computers (Meishar-Tal, 2016). At present, there are

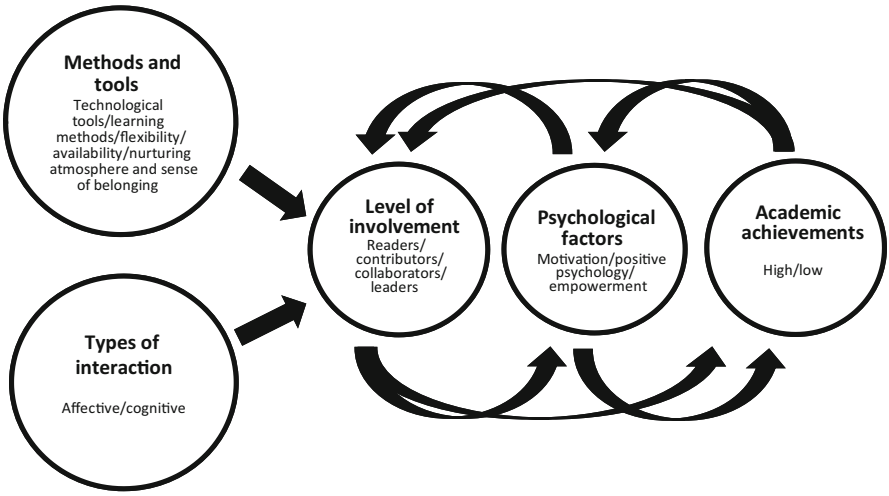

Fig. 7.2 A model of improving student motivation and academic achievement by interacting on social platforms

diverse study methods, in addition to the traditional study method of classroom studies such as distance learning, collaborative learning, which relates mainly to the integration between the student's knowledge and environment and allows the learner to express himself in a group and in informal methods such as self-study while watching videos or use of educational software (Adani et al., 2012). Use of interactions on social networks affords a wide range of benefits such as separating the learner and teacher in time and place, which allows learning flexibility and the ability to strengthen learning processes by new opportunities that technology offers to learners (Beetham et al., 2013). The social network offers availability and use of information at any time; the teacher's availability is very high, enabling learning beyond the classroom boundaries, where the students revise the material at home and come to class with additional knowledge and it is possible to correct students' errors promptly. The social network is capable of influencing nurturing the atmosphere and sense of belonging in class, creating a dialogue and sharing among students (Deshen et al., 2014). In addition, the interactions on two main teaching dimensions are described: the cognitive dimension, comprised of the ability to organize the course and the lesson and utilizing time for learning, and the affective dimension, comprised of the teacher's ability to display respect for the students, empathize with their difficulties, encourage and empower them, and provide assistance, as presented in Hativa's model (2015).

The next stage in the model describes students' level of involvement – readers who seek and extract knowledge and look at pictures; contributors of content; collaborators among the group members; and leaders who set policy and guide (Preece & Shneiderman, 2009). The aspiration is to design tools and learning methods that will improve students' level of involvement and encourage student behaviors such as sharing information and supporting one another.

The next stage describes the psychological factors that affect success in studies and include intrinsic motivation, attained mainly through social relationships that support perceived efficacy (Adani et al., 2012), which contribute significantly to improving the atmosphere and social belonging in educational institutions (Bromberg-Martin et al., 2010). Also, empowerment is the process in which the mainly internal strength (power) of the individual or organization is developed and acquired, when people collaborate with each other in order to form their own social rules. Empowerment is often achieved by the communication process of people who communicate in small groups. When people unite around a common goal, there are opportunities for collective learning, mutual support, and group action (Aldoory, 2003). In addition, positive psychology provides insights on how skills and thoughts invoke positive feelings that effect learning and success in one's studies (Waters, 2011). The higher students' level of involvement, the higher the chances of raising personal and collective motivation and suggesting the potential advantages of the social network and of using technology. As a result, the last stage in the model, indicating the main goal of using social networks – improving academic achievements – will also be attained.

The model is not a one-way model and it is not necessary to go through each stage in order to reach the next. The level of involvement will itself facilitate academic

achievements due to exposure to the study material and interaction in the class and due to the option of receiving extra support from the teacher and the group members. There are cyclic relations, therefore some of the arrows point in both directions. High achievements further enhance motivation because they create a sense of self-worth, and also empower the learner, and these positive feelings in turn increase involvement in social technological environments (e.g. with a good and confident feeling of control and understanding the course material, the student will feel able to help others understand the material.

7.7 Discussion and Conclusion

Learning technologies and digital teaching tools have gradually become major work tools and are being integrated in the different educational institutions. One of the main tools that support learning is the use of social networks for interactions between students and teachers and among the students themselves. The integration of communication in these social groups has changed the classic face-to-face classroom arena and transformed the teacher into an instructor and mediator between the students and the study material. Our model presents the significance of using these social networks as tools for attaining involvement and motivation among students in both the emotional level and the pedagogic level. The inclusion of social networks in learning is particularly important for Generation Z, since a significant part of their life activities already takes place on social networks. Social networks shape and construct cultural identities. Therefore, it is important to adapt the teaching methods to the students' tools and habits, and to reflect the changing dynamics of evolving cultural identities. The main role of the teacher is no longer to provide knowledge, since knowledge is available in the technological era at anytime and anywhere, but rather to produce meaningful learning and arouse inquisitiveness and motivation to learn. Collaborative learning via social networks is an excellent tool for achieving this goal.

It is extremely significant to teach and train teachers in the use of social networks. At present, there is no systematic training of teachers that provides a wide understanding of the advantages of using these networks and the ability to utilize them to encourage students' motivation to learn. In addition, in social networks, the teacher is required to define his role within the group; should he lead the group, namely navigate and direct the students, or should he be an observer and allow students to increase their involvement and express themselves? each educator /field may have a different perception or preference regarding the way to use social networks, but it is important that teachers define their goals in advance and integrate use of social networks according to these goals. The model creates a structuring of all the advantages of using interactions on social networks and allows teachers to reach a judicious decision regarding the manner of use and their personal involvement as teachers.

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Chapter 8
Contributing Factors to Refugee Children's Education and Academic Performance

Nina Maadad, I. Gusti Ngurah Darmawan, and Salah Kutieleh

Abstract This study, conducted in selected schools in in Sydney, explores factors contributing to the education of Arabic Speaking refugee children. More specifically, This research seeks to identify how individual factors such as gender, country of birth, years absent from school, family factors such as parents' education and involvement, and social factor- specifically, social support- influence their schooling, emotional and behavioural problems, and academic performance. Results of this study can serve as the basis for strategies that support refugee children, parents and teachers in Australian schools.

Keywords Academic performance · Arabic speaking refugees · Australia · Background characteristics · Education · Refugee children, · Schooling · SEM analysis

8.1 Introduction

In the last few years, the world's displaced refugees have soared in numbers and these numbers are not likely to go down with the current tragic situation in Ukraine. This has triggered investigations into their needs and ways for them to make progress in life. Given that children comprise the bulk of this growing refugee population, delivering quality education in the host countries is very critical. Despite huge efforts and investments by United Nations Agencies and INGOs to offer education programs, 50% of primary school-age refugees and 75% of secondary school-age children are not in school (UNHCR, 2016, 2019). Although policies have been in place for refugee children for more than 70 years, there is little evidence that

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mandated provisions have brought about effective education outcomes for them. What is still relatively vague in the literature is the basis of the decision made in relation to curriculum, language issues, role of host countries, formal education versus non formal, segregated versus integrated education. These have been the subjects of fierce debates, reports and conferences. Australia has had a long history of in resettling refugees and vulnerable people; and prides itself on providing the best settlement services and support to refugees and refugee-like situations so they could have a better life (Department of Social Services – DSS, 2018). According to the Department of Home Affairs (2019) Australia's response to global humanitarian conditions is designed to be effective. Compared to other refugee-receiving countries, the latest UNHCR report shows that Australia is placed third in providing permanent resettlement to refugees, after to Canada and the United States (RCOA, 2016). It is still debatable whether Australia has honoured its commitments to refugees as as declared.

8.2 Literature Review

8.2.1 Education for Children from Refugee and Refugee-Like Backgrounds in Australia

Most state and territory schools in Australia, including independent and Catholic schools, have in place a New Arrivals Programme for the children of refugees to support their learning of Standard Australian English (SAE) as additional language/dialect (EALD), enabling them to learn the Australian Curriculum. This program is mostly funded by the federal government (DET, 2016). Research findings confirm the certainty of refugees' traumatic experiences which is usually aggravated by their low levels of literacy and numeracy in their own formal schooling prior to their arrival in Australia. Furthermore, weak or disrupted family ties or physical/sensory impairment experiences put students from refugee backgrounds at a major disadvantage and o behind other English as an Additional Language or Dialect (EAL/D) peers in attaining comparable literacy skills levels (Brown et al., 2006; Matthews, 2008; Windle & Miller, 2012; Nawyn, 2012; Naidoo, 2015; Read et al., 2015; de Heer et al., 2016). A number of Australian non-government institutions and community programs and organisations have worked, either as independently or in partnership with each other and/or with government, to support refugee s to obtain their basic needs including education.

8.2.2 *Factors Influencing the Education of Refugee Children*

Child development is a complex system of relationships affected by many levels of the surrounding environment, from immediate settings of family and school to broad cultural values, laws, and custom In 1979, Bronfenbrenner conceptualised the development context of the social environment is primarily differentiated in terms of successively nested systems, currently referred to as the *bioecological systems model*. Adapted from the field of ecology. It emphasises that all human activity occurs within social contexts. In a systematic analysis of 5 studies conducted across developed and developing countries, Arakelyan and Ager (2021) identified a range of risk and protective factors that arise from refugee children's individual selves, families, communities and broader society. These impact their psychosocial wellbeing and mental health. Employing Bronfenbrenner's person-process-bioecological model (2005) of human development, Arakelyan and Ager (2021, p. 502) recognised the principles of Bronfenbrenner's understanding of life-course of children's development and their implications for determining life outcomes. Figure 8.1 illustrates Bronfenbrenner's (2005) bioecological model adapted by Arakelyan and Ager (2021), and subsequently applied in this study.

Using this framework, three individual characteristics – gender, country of birth, and the number of years the refugee children were absent from school – function as potential factors that may influence their education and academic performance. Parents' education and their encouragement are two family-related factors considered as playing a critical role. Together with the social support they received, it is argued the above mentioned factors are argued to influence their psychosocial wellbeing and mental health, schooling experience, and ultimately to influence their academic performance as can be seen in Fig. 8.1.

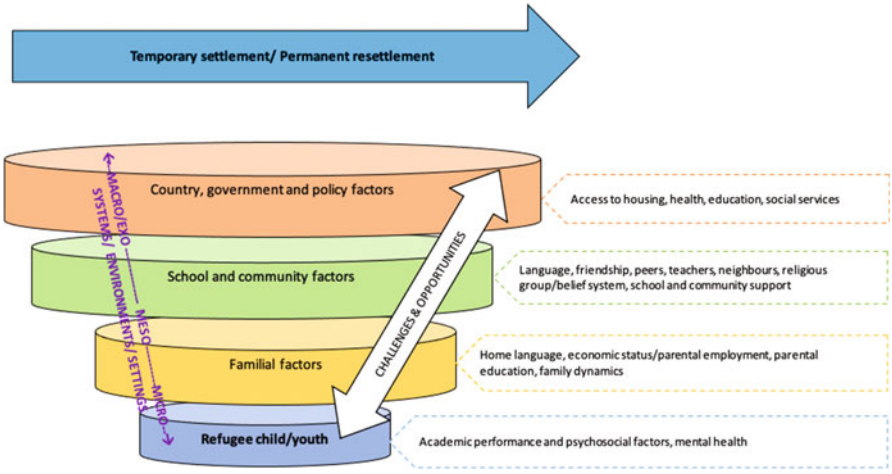

Fig. 8.1 Bronfenbrenner's person-process-context-time (PPCT), 2005

8.2.3 Psychosocial Wellbeing and Mental Health of Refugee Children

Demand is growing for quality mental health screeners to identify externalising and internalising problems in children and adolescents, and a variety of proprietary measures have been developed (Collett et al., 2003; Paalman et al., 2013). The Strengths and Difficulties Questionnaires (SDQ) is one of the leading measures in the field (Goodman, 1997; Caci et al., 2015). The SDQ comes in self-report, caretaker, and teacher report versions and has scales measuring Peer Problems, Conduct Problems, Emotion Problems, Hyperactivity, and Pro-Social behaviours. Many reports have investigated the psychometric properties of the SDQ with many indicating adequate to good psychometric properties (Niclasen et al., 2012; Stone et al., 2010), but others indicating poorer properties (Toh et al., 2008). This study used the self-report version of the SDQ that measuring the levels of emotional symptoms, conduct problems, hyperactivity, peer problems, and prosocial behavior of refugee children.

8.3 Aim of the Study

The purpose of this research is to examine the experiences of refugee children in schools in Australia to understand how their individual, family and social factors or/and backgrounds shape their emotional and behavioural problems, schooling experiences and academic achievements. Issues of parental and community support, as well as positive and negative challenges they face are also covered.

8.3.1 Research Questions

1. What are the factors that influence refugee children's emotional and behavioural problems?
2. How do refugee children's background characteristics, parental and social support, and their emotional and behavioural problems impact their school experiences?
3. How do the background characteristics, parental and social support, emotional and behavioural problems, and schooling experience influence refugee children's academic performance?

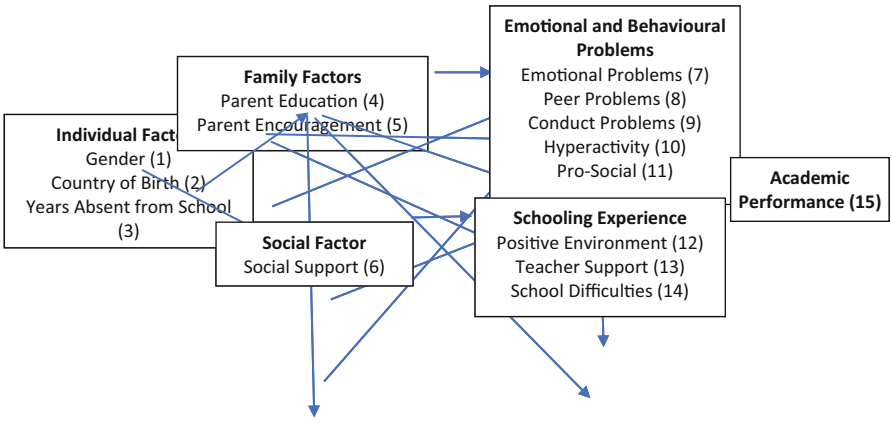

Fig. 8.2 Hypothesised model

8.3.2 Hypothesised Model

The hypothesised model proposed in this study is shown in Fig. 8.2. Three individual factors (*Gender, Country of Birth,* and *Years Absent from School*), two family-related factors (F*ather's Education and Parent Encouragement*), one social factor (*Social Support*), four measures of emotional and behavioural problems (*Emotional Symptoms, Conduct Problems, Hyperactive, Peer Problems,* and *Pro-Social*), three aspects of schooling experience (*Positive Environment*, *School Difficulties*, and *Teacher Support*), and *Academic Performance* as the final outcome, are included in the model. Rather than describing each specific hypothesis upon which the model is based, they are displayed visually in Fig. 8.2. Each path in the model, with its arrowhead indicating direction, serves as a hypothesised effect to be tested. It is hypothesised that the individual factors of the refugee children will influence the level of parental and social support they received or perceived. These factors will factors will subsequently shape their emotional and behavioural problems as well as school experience. All these factors will then ultimately influence their level of academic performance.

8.4 Methods

8.4.1 Sample

The data used in this study are drawn from a larger and ongoing project with the Centre for Lebanese Studies, funded by the Spencer Foundation and titled, "Towards an inclusive education for refugees: A comparative longitudinal study". While the main study was conducted in four countries (Australia, Lebanon, Turkey and

Germany), only data collected from 442 respondents South Australia, New South Wales Queensland and Victoria was considered.

8.4.2 Variables Included in This Study

The questionnaire employed in this study included the Self-Report Strengths and Difficulties Questionnaire (SDQ) with twenty-five 3-point scale items designed to investigate the emotional and behavioural states of refugee children. Five latent constructs of *Emotional Symptoms*, *Conduct Problems, Hyperactive, Peer Problems, and Pro-social* scales were included. This study incorporates two scales of perceived importance of *Social Support* and *Schooling Experience* as well as a number of background characteristic variables (see Table 8.1). *Academic Performance*, measured by the respondents' perceived levels of performance in a number of subjects, is the outcome variable.

8.4.3 Procedures

Data analysis started, in the first stage, with descriptive statistics to describe the nature of each variable included in the study. In the second stage, an exploratory factor analytical approach (EFA) employed, using the statistical software SPSS, to examine the possible factor structures of the newly developed scales included which comprise Social Support, Schooling Experience, and Academic Performance. Given, the SDQ questions are adopted from a previously established instrument, a confirmatory factor analysis (CFA) with MPLUS was conducted to evaluate how well the items included in each sub-scale reflect the latent constructs being measured. In both analyses, convergent validity- a component of construct validity – was evaluated. Convergent validity refers to the degree to which items share a high proportion of common variance. The size of factor loadings is one important consideration in this process. In the case of high convergent validity, high loadings on a factor would indicate that they converge on a common latent construct. At a minimum, all factor loadings should be statistically significant. For the magnitude of the standardised loading, cut-off values proposed by Hair et al. (2014) were used. Factor loadings of 0.3 and above are considered acceptable for proper interpretation of the measurement model.

Once the validity was established, the reliability of the measurements had to be tested. Construct reliability is calculated (Hair et al. 2014). Reliability is a measure of internal consistency, that is, how closely related a set of items are as a group. In other words, reliability is a measure of the degree to which indicators of a latent factor is internally consistent based on how highly interrelated the indicators are with each other, in the final stage, Structural Equation Modelling (SEM) served to examine the causal relationships among the variables involved. SEM is a statistical methodology

Table 8.1 Variables included in this study

No.	Name	Descriptions	Values
1	Gender	Respondent's gender	0 = male, 1 female
2	COB	Respondent's country of birth (born in Australia)	0 = no, 1 = yes
3	FEDU	Father's highest education level	0 = illiterate... 4 = university
4	MISS	Number of years being absent from school	Scale
5	PENC	Parents encourage my education	0 = never...6 = always
		Social support	
6	Q84a	Importance of mother in my education	0 = not important at all
7	Q84b	Importance of father in my education	1 = not important
8	Q84c	Importance of siblings in my education	2 = somewhat important
9	Q84d	Importance of friends in my education	3 = important
10	Q84e	Importance of teachers in my education	4 = very important
11	Q84f	Importance of social workers in my education	
		Schooling experience	
		Positive environment	
12	Q82a	Liking school	0 = strongly disagree
13	Q82f	Friendly teachers	1 = disagree
14	Q82g	Appreciative teachers	2 = neutral
15	Q82h	Variety of activities	3 = agree
16	Q82i	Parents visit the school	4 = strongly disagree
17	Q82j	School respects my family	
		School difficulties	
18	Q82b	Difficult local language	
19	Q82c	Difficult focusing in class	
20	Q82e	Communicating with teachers	
		Teacher support	
21	Q82d	Teachers are supportive	
22	Q82k	Teachers are harsh (−)	
		Academic performance	
23	Q80	Overall performance	0 = very poor
24	Q81a	Language	1 = poor
25	Q81b	Mathematics	2 = fair
26	Q81c	Science	3 = good
27	Q81d	Social studies	4 = very good
		SDQ	
	SDQ	***Emotional symptoms***	
28	Q104	I get a lot of headaches, stomach-aches or sickness.	0 = not true
29	Q109	I worry a lot.	1 = somewhat true
30	Q114	I am often unhappy, depressed or tearful.	2 = certainly true
31	Q117	I am nervous in new situations	
32	Q125	I have many fears	

(continued)

Table 8.1 (continued)

No.	Name	Descriptions	Values
		Conduct problems	
34	Q106	When I get very angry, I usually lose my temper.	
35	Q108	I usually do whatever I am told to do (—)	
36	Q113	I fight a lot with others	
37	Q119	Other people think that I am lying or cheating.	
38	Q123	I take things that are not mine	
		Hyperactive	
39	Q103	I cannot stay still for a long time in one place.	
40	Q111	I am constantly fidgeting or squirming.	
41	Q116	I get distracted easily and difficult to concentrate.	
42	Q122	I think before I do things (—)	
43	Q126	I stay focused and finish the work that I am doing (—)	
		Peer problems	
44	Q107	I would rather be alone than with people of my age.	
45	Q112	I have one good friend or more. (—)	
46	Q115	Other people of my age group generally like me (—).	
47	Q120	Other children pick on me or bully me.	
48	Q124	I get along better with adults than people my age	
		Pro-social	
49	Q102	I try to be nice to others and care about their feelings.	
50	Q105	I usually share things with others	
51	Q110	I am helpful if someone is hurt, upset or feeling ill.	
52	Q118	I am kind to younger children.	
53	Q121	I often offer to help others (parents, and children).	

that takes a confirmatory approach to the analysis of causal relationships among multiple variables or factors. The hypothesised model can be tested statistically in simultaneous analysis of the entire variables included in the model to determine the extent to which it is consistent with the data (Byrne, 2012). For the SEM, ten latent factors and five background variables were included, as presented in (Fig. 8.2). The model's validity was examined by establishing an acceptable level of fit validity and finding evidence of construct validity (Hair et al., 2014). Several goodness-of-fit indices tested how well the model fits the data, including the chi-square goodness of-fit test, the comparative fit index (CFI), the Tucker-Lewis index (TLI), and root mean square error of approximation (RSMEA).

8.5 Results

8.5.1 Individual Factors

Demographic information concerning gender and country of birth of the respondents is presented in Table 8.2. As evident in the table, the ratio of male 50% (n = 219) to female respondents 48% (n = 213) is nearly equal, with 9 (2%) respondents providing no responses. For country of birth the respondents were classified into 2 groups: those who were born in Australia and those who were born elsewhere. In this study, the majority of respondents, 84% (n = 371) were born in Australia.

In terms of how many years the respondents were absent from school in their country of birth, most indicated they did not missed any (69.7%, n = 308). Only 16% had been absent from school for at least 1 year, as presented in Table 8.3. Sixty-two of the respondents did not provide an answer.

8.6 Parental Support

8.6.1 Father's Highest Education Level

This study also seeks to investigate the effect of parents' education level a potential contributing factor factors. Two questions captured both father's and mother's levels of education. Surprisingly, none of the respondents answered the question concerning their mother's education and, therefore, the decision was to consider only the father's education level as (Table 8.4). Approximately, a third of the respondents' fathers attained a university degree (34.8%, n = 154).; a third completed their secondary schooling (33%, n = 146), and only 3% were either illiterate or did not go beyond primary school.

Table 8.2 Demographic information

Variable	Frequencies (%)		
Gender	Male: 219 (50%)	Female: 213 (48%)	Missing: 9 (2%)
Born in Australia	Yes: 371 (84%)	No: 71 (16%)	Missing: -

Table 8.3 Number of missing school years

Response	Frequency	Percent
None	308	69.7
1 year	46	10.4
2 years	14	3.2
3 years or more	12	2.7
Missing	62	14.0
Total	442	100.0

Table 8.4 Father's highest education level

Education level	Frequency	Percent
University	154	34.8
Secondary (grade 10–12)	146	33.0
Intermediate (grade 7–9)	113	25.6
Primary (grade 1–6)	10	2.3
Illiterate	4	.9
Missing	15	3.4
Total	442	100.0

Table 8.5 Parent encouragement

Response	Frequency	Percent
Always	253	57.2
Often	90	20.4
Sometimes	77	17.4
Rarely	15	3.4
Never	5	1.1
Missing	2	0.5
Total	442	100.0

8.6.2 Parent Encouragement

In their response to whether they were encouraged by their parents to go to school, more than half stated their parents always encouraged them to go to do so (57.2%, n = 253). Less than 5% indicated rarely (3.4%) or never (1.1%). The complete frequencies of their responses are presented in Table 8.5.

8.7 The Importance of Family, Peers, Teachers, and Social Workers' Support

The perceived importance of the support from various sources is measured by a 6-item scale using 5 response categories ranging from not important at all (0) to very important (4). Descriptive statistics for each item are presented in Table 8.6. On average, support from both parents, father (M = 3.47, SD = 0.769) and mother (M = 3.42, SD = 0.795), is perceived to be the most important. Followed by teachers' support (M = 3.33, SD = 0.747) and siblings (M = 3.09, SD = 0.918) is ranked second. The support from their peers and social workers is deemed to be the least important. Results of the exploratory factor analysis suggest these 6 items can form a single scale. All factor loadings are larger than 0.50, strongly suggesting the 6 items reflect well the perceived importance of social support received by the respondents. The Cronbach's alpha coefficient for this scale is 0.75, which means that the scale is reliable.

Table 8.6 Importance of the support received from various people

	Factor Loading	N	Mean	SD	Skewness		Kurtosis	
					Statistic	SE	Statistic	SE
Mother	0.75	430	3.47	.765	−1.356	.118	1.276	.235
Father	0.77	424	3.42	.795	−1.261	.119	1.318	.237
Siblings	0.74	407	3.09	.918	−.748	.121	.114	.241
Friends	0.65	401	2.74	1.019	−.319	.122	−.784	.243
Teachers	0.69	416	3.33	.747	−.893	.120	.463	.239
Social workers	0.53	369	2.29	1.274	−.258	.127	−.772	.253

Table 8.7 Schooling experience

Constructs and Items	Factor Loading	N	Mean	SD	Skewness		Kurtosis	
					Est.	SE	Est.	SE
Positive environment	Construct reliability			0.87				
Liking school	0.666	438	2.94	0.92	−0.93	0.12	1.30	0.23
Friendly teachers	0.742	438	3.12	0.91	−1.00	0.12	1.03	0.23
Appreciative teachers	0.765	435	3.09	0.91	−0.91	0.12	0.70	0.23
Variety of activities	0.750	436	3.15	0.90	−0.93	0.12	0.73	0.23
Parents meet school	0.668	434	2.83	1.10	−0.58	0.12	−0.42	0.23
School respects my family	0.731	436	3.16	0.89	−0.85	0.12	0.34	0.23
School difficulties	Construct reliability			0.81				
Difficult local language	0.614	436	1.95	1.19	−0.14	0.12	−0.91	0.23
Difficult focusing in class	0.847	435	1.98	1.27	0.05	0.12	−0.96	0.23
Communicating with teachers	0.828	436	2.01	1.37	0.07	0.12	−1.22	0.23
Teacher support	Construct reliability			0.77				
Teachers are supportive	0.749	438	3.02	0.99	−0.91	0.12	0.16	0.23
Teachers are harsh (reversed)	0.828	434	2.66	1.38	−0.74	0.12	−0.72	0.23

8.8 Schooling Experience

Responses to 11 items used to measure the scale of Schooling Experience were subjected to an exploratory factor analysis using Data Analysis Software (SPSS). The response options for these items range from 0 for Strongly Disagree to 4 for Strongly Agree. Results suggest this scale can be broken down into three sub-scales, namely Positive Environment (6 items), Difficulties (3 items), and Teacher Support (2 items) as listed in Table 8.7. Items included in each scale all have a good factor loading, larger than 0.6, strongly suggesting these items are very good reflectors of the constructs being measured. The reliability of the Positive Environment sub-scale is reasonably high with a Construct Reliability coefficient of 0.87, indicating a high reliability. The other two sub-scales have a reliability coefficient that is slightly lower, 0.81 and 0.77, but are still higher than the cut-off value of 0.7.

On average, the respondents agree the schooling environment that they experienced was quite positive. The mean score for each item included in the Positive Environment sub-scale ranges from 2.83 to 3.16, which is very close to 3, the Agree level. As for the Difficulty sub-scale, the mean responses range from 1.95 to 2.01, which are very close to 2, the Neutral level. They tend to neither agree nor disagree with the three items included in this subscale. With regard to Teacher Support, they tend to agree with the statements included to measure this sub-scale. Their average responses range from 2.66 to 3.02.

8.8.1 Academic Achievement

Academic performance is measured using perceived achievement by asking how well they learn in various subjects in their respective schools (Table 8.8). The response options for these items range from 0 for Very Poor to 4 for Very Good. The descriptive statistics for all the items presented in Table 8.7 indicate that, on average, they perceived themselves to achieve at a moderate level, somewhere between fair and good outcomes with the mean score of their response ranging from 2.49 to 2.78. The results of the exploratory factor analysis suggest these items can form a single scale. All factor loadings are larger than 0.60 indicating that the 5 items are good reflectors of the respondents' academic performance. The Construct Reliability coefficient for this scale is 0.91, meaning the scale is very reliable.

8.9 SDQ

As mentioned earlier, the 25 SDQ items are subjected to a confirmatory factor analysis using Mplus version 8. The responses to the negative items were reversed and a five-factor model was developed and tested. The factor loadings, along with the descriptive statistics of the items are reported in Table 8.9.

From the initial CFA results, a number of items have a factor loading below the cut-off value of 0.3. In general, the items with low loadings are those with negative

Table 8.8 Academic performance

	Factor Loading	N	Mean	SD	Skewness		Kurtosis	
					Statistic	SE	Statistic	SE
Overall performance	0.604	436	2.78	0.757	0.076	0.117	−0.691	0.233
Language	0.848	424	2.49	0.938	−0.182	0.119	−0.515	0.237
Mathematics	0.896	422	2.73	0.9	−0.155	0.119	−0.448	0.237
Science	0.856	417	2.54	0.898	−0.034	0.12	−0.216	0.238
Social studies	0.889	418	2.44	0.883	0.081	0.119	0.164	0.238

Table 8.9 Descriptive statistics and measurement model results of the SDQ

SDQ	N	Mean	SD	Factor loading
Emotional symptoms	***Construct reliability***			***0.61***
I get a lot of headaches, stomach-aches or sickness.	428	0.54	0.728	0.649
I worry a lot.	424	0.91	0.663	0.506
I am often unhappy, depressed or tearful.	427	0.66	0.709	0.465
I am nervous in new situations	427	1.02	0.678	0.306
I have many fears.	426	0.86	0.733	0.492
Conduct problems	***Construct reliability***			***0.55***
When I get very angry, I usually lose my temper.	428	0.62	0.712	0.489
I usually do whatever I am told to do (−)	428	0.79	0.657	0.264
I fight a lot with others	426	0.27	0.517	0.448
Other people think that I am lying or cheating.	426	0.43	0.641	0.535
I take things that are not mine	427	0.27	0.542	0.484
Hyperactive	***Construct reliability***			***0.45***
I cannot stay still for a long time in one place.	428	0.75	0.708	0.466
I am constantly fidgeting or squirming.	426	0.62	0.720	0.608
I get distracted easily and difficult to concentrate.	422	0.81	0.621	0.387
I think before I do things (−)	414	0.41	0.552	0.106
I stay focused and finish the work that I am doing (−)	428	0.60	0.654	0.274
Peer problems	***Construct reliability***			***0.41***
I would rather be alone than with people of my age.	428	0.70	0.725	0.584
I have one good friend or more. (−)	427	0.47	0.618	−0.028
Other people of my age group generally like me (−).	424	0.63	0.593	0.031
Other children pick on me or bully me.	431	0.43	0.688	0.691
I get along better with adults than people my age	432	0.95	0.726	0.385
Pro-social	***Construct reliability***			***0.62***
I try to be nice to others and care about their feelings.	432	1.75	0.503	0.342
I usually share things with others	433	1.39	0.625	0.441
I am helpful if someone is hurt, upset or feeling ill.	433	1.52	0.620	0.479
I am kind to younger children.	431	1.60	0.574	0.664
I often offer to help others (parents, and children).	424	1.38	0.666	0.574

statements. The Construct Reliability coefficients for the five subscales are relatively low. This SDQ model adequately fits the data. The chi-square (1252) divided by the degrees of freedom (263) is 4.7, which is still below 5 as suggested by Wheaton et al. (1977). However, the CFI and TLI values of 0.78 and 0.72, respectively, are relatively low, below the cut-off value of 0.8. The RSMEA value is 0.09, which is higher than 0.05 but still below 0.1. In general, even though the model cannot be considered to have a very good fit, it is nonetheless at an acceptable level. The correlations among the five subscales are presented in Table 8.10.

Considering the high correlation among the five subscales, except for the Pro-social subscale that has a relatively low correlation with the other four subscales, a second-order factor labelled as Emotional and Behavioural Problems was created

Table 8.10 Correlations among SDQ subscales

	(1)	(2)	(3)	(4)	(5)
1. Emotional symptoms	1.00	0.54	0.97	0.88	0.41
2. Conduct problems		1.00	0.80	0.69	−0.60
3. Hyperactive			1.00	0.85	0.07
4. Peer problems				1.00	0.14
5. Prosocial					1.00

and the subscales are re-tested again. Considered here are their relationships with other variables in the SEM model. In this stage, the measurement model is refined by removing the items with low factor loadings. By doing this, it is expected that the model fit will improve.

8.10 SEM Model Results

Based on the initial SEM results, it was found that SDQ7, SDQ11, SDQ14, SDQ16, SDQ21, and SS6 have a factor loading less than 0.3 and subsequently removed. Any path coefficients that have a p-value more than 0.05, the non-significant path coefficients, are also discarded. The standardised results of the final model are shown in Fig. 8.2. The final measurement model results are presented in Table 8.11 after the removal of any factor loadings lower than 0.3. Results indicate that the remaining items are now good indicators of their respective latent construct (Fig. 8.3).

The structural model results illustrate the relationships among the latent constructs and the additional demographic variables presented in Table 8.12.

As shown in Table 8.12, Parent Encouragement is influenced by Parent Education ($\beta = 0.33$), Country of Birth ($\beta = 0.17$), and Years Missing School ($\beta = -0.14$). The positive effects of the highest level of parent education and country of birth indicate that refugee children with more educated parents and those who were born in Australia receive a higher level of parental encouragement. Meanwhile, the negative effect of years missing school confirms those refugee children who missed more school years receive less encouragement from their parents. Referring to the importance of social support, their perception is influenced positively by the level of their parents' education ($\beta = 0.11$) and parental encouragement ($\beta = 0.47$). Those who have parents with a higher level of education and who receive stronger encouragement from them are more likely to realise the importance of social support. However, the more missing years they had in their home country the less they see the importance of social support ($\beta = -0.20$). Parent/father education also has a negative influence on how the refugee children perceived the level of support they receive from their teacher ($\beta = -0.17$). It is possible that highly educated parents have the confidence and skills to provide more help at home so that their needs for teacher support abate. Furthermore, these background factors influence their social

Table 8.11 Measurement model results

Latent variable	Observed variable	Factor loading
Social support	Mother	0.81
	Father	0.87
	Siblings	0.53
	Friends	0.35
	Teachers	0.60
Teacher support	Teachers are supportive	0.93
	Teachers are harsh (reversed)	0.34
Emotional symptoms	I get a lot of headaches, stomach-aches or sickness.	0.66
	I worry a lot.	0.52
	I am often unhappy, depressed or tearful.	0.47
	I have many fears.	0.49
Conduct problems	When I get very angry, I usually lose my temper.	0.52
	I fight a lot with others	0.45
	Other people think that I am lying or cheating.	0.54
	I take things that are not mine	0.49
Hyperactive	I cannot stay still for a long time in one place.	0.46
	I am constantly fidgeting or squirming.	0.60
	I get distracted easily and difficult to concentrate.	0.38
	I stay focused and finish the work that I am doing	0.32
Peer problems	I would rather be alone than with people of my age.	0.62
	Other children pick on me or bully me.	0.68
	I get along better with adults than people my age	0.36
Emotional and Behavioural problems (second order factor)	Emotional symptoms	0.98
	Conduct problem	0.70
	Hyperactive	0.95
	Peer problems	0.93
Pro-social	I try to be nice to others and care about their feelings.	0.35
	I usually share things with others	0.49
	I am helpful if someone is hurt, upset or feeling ill.	0.39
	I am kind to younger children.	0.62
	I often offer to help others (parents, and children).	0.68

(continued)

Table 8.11 (continued)

Latent variable	Observed variable	Factor loading
School difficulties	Difficult local language	0.51
	Difficult focusing in class	0.49
	Communicating with teachers	0.56
Positive environment	Liking school	0.51
	Friendly teachers	0.65
	Appreciative teachers	0.71
	Variety of activities	0.69
	Parents meet school	0.59
	School respects my family	0.67
Academic performance	Overall performance	0.47
	Language	0.70
	Mathematics	0.82
	Science	0.86
	Social studies	0.88

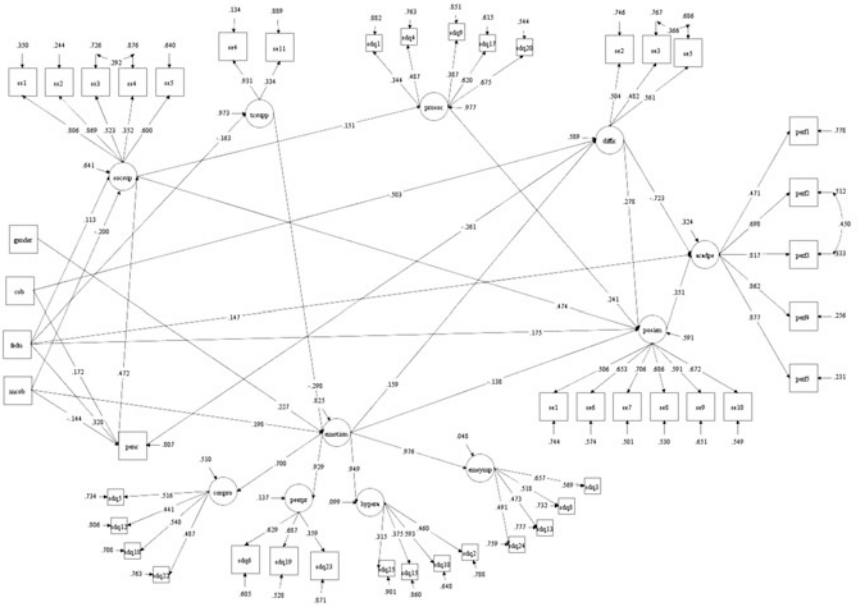

Fig. 8.3 Standardised final model results

behaviour as well as the levels of emotional and behavioural problems they have. Those who perceived the importance of social support will tend to elicit more positive social behaviour ($\beta = 0.04$). Girls ($\beta = 0.23$) and those who have more missing school years seem to have more problems (emotional, conduct, peer, and

Table 8.12 Structural model results

Dependent variable	Independent variable	Unstd estimate	Std. estimate	p-value
Parent encouragement	Parent education	0.35	0.33	0.000
	Country of birth	0.59	0.17	0.000
	Years missing school	−0.20	−0.14	0.002
Social support	Parent education	0.08	0.11	0.028
	Years missing school	−0.19	−0.20	0.000
	Parent encouragement	0.32	0.47	0.000
Teacher support	Parent education	−0.17	−0.17	0.006
Pro-social	Social support	0.04	0.15	0.032
Emo. & Behav, problems	Gender	0.22	0.23	0.000
	Years missing school	0.14	0.20	0.000
	Teacher support	−0.16	−0.30	0.001
School difficulties	Country of birth	−1.07	−0.50	0.000
	Parent encouragement	−0.16	−0.26	0.000
	Emo. & Behav, problems	0.20	0.16	0.015
Positive environment	Fathers education	0.09	0.18	0.001
	Social support	0.33	0.48	0.000
	Pro-social	0.62	0.24	0.000
	Emo. & Behav, problems	−0.13	−0.14	0.018
	Difficulties	0.21	0.28	0.000
Academic performance	Parent education	0.06	0.15	0.003
	Positive environment	0.28	0.35	0.000
	Difficulties	−0.44	−0.73	0.000

hyperactive problems) compared to boys. In the meantime, those who receive more support from their teacher tend to have fewer of these problems ($\beta = -0.30$). Those factors mentioned earlier have significant roles in shaping their school experience. Those who were born in Australia ($\beta = -0.50$), received stronger encouragement from their parents ($\beta = -0.26$) and encountered more problems ($\beta = 0.20$) tend to experience more difficulties in school which will then strongly compromise their academic performance ($\beta = -0.73$). In contrast, those with more educated parents ($\beta = 0.18$), perceived higher importance of social support ($\beta = 0.48$), more positive social behaviour ($\beta = 0.24$), and encountered fewer problems ($\beta = -0.14$) tend to experience a more positive school environment. This in turn will influence their academic performance positively ($\beta = 0.35$). Additionally, parent education directly and positively influences their academic performance ($\beta = 0.15$).

8.11 Discussion

This study investigated the experiences of refugee children in schools in Australia in order to understand how background characteristics impact their schooling experiences and academic achievements. The sample consisted of a balanced number of males and females respondents who are mostly born in Australia, With regard to their parental education, the majority of the fathers at least have completed their secondary education. Unexpectedly, the respondents did not indicate their mothers' educational backgrounds. Cultural reason could be advanced a plausible explanation, because in some cultures, a mother's prime role is to nurture the home environment and children and education is relegated to a secondary position. This is favourably looked at in many cultures. The refugee children involved in this study reported a high level of parental encouragement. It is The majority of parents encouraged their children to go to school and aim for higher education. Refugee children with more educated parents, who were born in Australia and have missed fewer school years, in general, will receive a higher level of parental encouragement.

In terms of the perceived importance of social support, most children indicated that the support they received for their schooling originated mainly from their parents as they encouraged them to keep learning at school and aim for a tertiary qualification. This was followed by the teachers' support and the fact that teachers demonstrated a form of respect for the children's parents which meant so much for them. This was viewed positively by the children especially by mentioning that their teachers – after their parents – were the most supportive of their education and schooling.

It is a known fact that schools offer social connection and provide opportunities for refugee children to meet other children, make friends and build their futures. However, some children are culturally 'shackled' to the extent that do not feel confident to mix with culturally different children in a formal setting such as the school. Some become tangled up in certain aspects of social, cultural or even political systems, which might influence their engagement, attitude and education outcomes. In general, the previous schooling experiences of refugee children tend to vary drastically. Some faced huge learning disadvantages and or interrupted schooling while other lost years waiting to get a home in a country to go to, some had to live in refugee camps for years praying for hope and freedom; and the lucky ones had their applications for a safe haven in Australia quickly processed and become part of this study.

The results revealed that the refugee children involved in this study experienced relatively low rates of psychosocial distress. The mean values of almost all items used to measure the levels of emotional symptoms, conduct problems, hyperactive, and peer problems are relatively low. In addition, they perceived themselves as pro-social and having positive social interactions. Female respondents and those who were absent from school for longer seems to exhibit a higher level of emotional and behavioural problems. The majority of refugees in this study leave their countries to escape political riots, wars, economic collapse, instability and they were

hoping to settle somewhere where a good future in the form of work, education/training, raising a family and a safe community were highly prized. Refugee children who encountered more emotional and behavioural problems tend to have negative experiences in school. They find it difficult to concentrate in class and to communicate with their teachers and friends, which then undermine their academic performance. In contrast, those with more educated parents perceived the high importance of social support, expressed more positive social behaviour, and have less emotional and behavioural problems.

Additionally, and perhaps most saliently, our findings illustrate that emotional and social behaviour as demonstrated in the responses created for refugee children, problems that affected not only their schooling but also other aspects of their lives on a daily basis. This is confirmed in their behaviour, reaction, health, social connection or disconnection, concentration and emotions. A clear recommendation is that schools must incorporate social workers who identify with the culture, can speak the language, and understand the path, trauma and experiences that refugee children have endured. This is important given the need to give them the support required during their schooling.

8.12 Conclusion

Students from refugee backgrounds face many challenges as a consequence of their previous life experience, greatly shaping their successful transition to Australian schooling. Recognising that there is no overarching schooling approach to support these children, the complexities of each individual refugee student's situation must precede any broad school support program in order to achieve positive outcomes. There can be no 'one size fits all' approach. While a number of school-based support systems and other programs have been established and to some extent are successful, more research is needed to identify the best practices of such programs that further deliver employment pathway opportunities for students from refugee backgrounds. In summary, our findings indicate that: (1) the majority of refugee children report their parents are the main support; (2) using a social worker or teacher who is familiar with the language and background may help create better connections with cultural norms in families, schools and communities; (3) a disconnect exists due to the language barrier which means more language support must be provided for both children and parent; and (4) teacher support is critical in curtailing emotional, social, and behavioural problems, creating a more positive school experience, which in turn lead to better academic performance.

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Chapter 9
Global Dialogues on Inclusive Education: A Retrospective and Comparative Analysis of the *Salamanca Statement*, Article 24, and *General Comment #4*

Margaret Winzer and Kas Mazurek

Abstract This critical book chapter describes, compares, and reflects on inclusive schooling for students with disabilities as detailed in three narratives produced by UNESCO and the UN General Assembly: the 1994 *Salamanca Statement*, Article 24 of the 2006 *Convention on the Rights of Persons with Disabilities*, and the CRPD Committee's 2016 *General Comment* #4. Case studies that historicized and analyzed each document produced four main themes: models of disability, inclusive education as a right, classroom placement, and special education. When compared, the themes showed a shared forum on foundational issues but different policy intents relevant to education placement and special education. In terms of the present shading of the global inclusive map, inclusive schooling as represented by the Salamanca agreement persists as the main organizational form; Article 24's central theme of fully inclusive environments is struggling to gain traction on the global stage.

Keywords Inclusive schooling · Full inclusion · Salamanca Statement · Convention on the Rights of Persons with Disabilities · Article 24 · General Comment #4 · School placement

9.1 Global Dialogues on Inclusive Education: Introduction

Inclusive schooling for students with disabilities debuted on the education reform map in the early-1980s.[1] At the global level, the socio-political-philosophical tenets are widely brokered by policy actors representing international organizations,

[1] Europe, the UK, and other countries use the term *special education needs* in reference to children and youth perennially at risk of marginalization, exclusion, or underachievement. In line with the CRPD, this paper uses the term *disabilities*.

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primarily the United Nations and its agencies. Of the generated windstorm of pledges, documents, and legislation, three have been paramount in ushering inclusive schooling into the international theatre: the 1994 *Salamanca Statement on Principles, Policy and Practice in Special Needs Education* (UNESCO, 1994), Article 24 of the *Convention on the Rights of Persons with Disabilities* (CRPD; UN, 2006), and *General Comment #4* (UN-CRPD Committee, 2016; henceforth GC4). The *Salamanca Statement* is widely hailed as a paradigm shift that actively fabricated the global contours of the inclusive movement and continues "to guide the agenda of national and international inclusive policies" (Magnusson, 2019, p. 1). Article 24, the first explicit legal enunciation of the right to inclusive education for persons with disabilities, is framed as "a masterpiece" that is "universally celebrated for its comprehensive and visionary embrace of the inclusion principle" (Degener, 2014, p. 2; Heyer, 2021, p. 46). GC4, an authoritative evidence-based interpretation of Article 24, was produced by the CRPD Committee in 2016. Byrne (2019) eulogizes both Article 24 and GC4 as "the most comprehensive international policy in existence on inclusive education" (p. 5).

Such hyperbole may seem to imply broad consensus on the meanings, progress, and future course of inclusive schooling. Nothing could be further from reality. In fact, there is an established body of research reporting on the ways in which the meanings attached to inclusive schooling are, both in theory and operationally, highly complex, context specific, and inundated with internal contradictions (e.g., Florian, 2014; Nilholm, 2021; Slee, 2020). Arguably, understandings of education placement form the most enduring, unresolved, and emotional issues. Placement, simply defined as students' school addresses, chiefly concerns whether students with disabilities are placed with their peers in general classrooms or in the segregated settings typical of special education. Berg (2007) characterized the options as "dueling polarities" (p. 4). He used the colloquial *partial inclusion* (also referred to as the multitrack approach, multiple option system, sometimes the special education model, and represented by the least restrictive environment) to describe processes in which students with disabilities are housed along a continuum of settings spanning general education to categorical special education placements. *Full inclusion* (also called the one-track system, occasionally true or absolute inclusion) is portrayed by the trope 'All means all.' Champions seek to transform schools and broaden access to general classrooms. All those with disabilities at all levels must be accommodated in general classrooms with access to general curricula at all times throughout their entire school careers: the type and depth of needs and abilities are not germane to decisions about education placement and provisions for instruction outside the general classroom are not possible.

9.1.1 Politics of Education Placement

The politics of education placement function as the theoretical and practical organizing construct of this critical book chapter. The overarching aim is fairly narrow.

Based on the interface of inclusive schooling, placement issues, and the selected UN documents, we undertake an analysis, comparison, and reflection on how the *Salamanca Statement* and Article 24, along with GC4, its interpretative guide, frame full and partial inclusion. Critical engagement with the polarized paradigms of placement related to the education of students with disabilities is anything but novel. However, addressing the issues through the lenses of international documents is timely and instructive on a number of levels. Broadly, the global slant contributes to the growing body of international work dedicated to tracking the inclusive agenda as a function of global governance. More pointedly, while scholars have produced a solid and robust body of comment, first reporting on the *Salamanca Statement*, later adding Article 24 (e.g., Ainscow, Slee, & Best, 2019; Anastasiou & Kauffman, 2019; de Beco, 2014; Winzer & Mazurek, 2017, 2019, 2020), the recent *General Comment #4* is barely explored. Examining its terrain and comparing it to antecedent texts significantly expands conversations about the global inclusive agenda. Importantly and immediately, tensions between proponents of partial models that take a cautious view of the wisdom of 'All means all' and opposing stances that systematically identify with fully inclusive paradigms have never been as pronounced and in conflict as they are today. A popular strand in the present discourse emphasizes how the suite of actors promoting full inclusion increasingly views their field as a distinct and thriving domain of theorization, practice, and research that is abandoning any gravitational pulls to its ancestry in special education (e.g., Hardy & Woodcock, 2015; Slee, 2020). A certain set of beliefs shape their thoughts: the moral rightness of full inclusion; faith in general classrooms as the optimum setting for all children with learning difficulties; hopes of refashioning domestic education policy by persuading sites with established special education systems to move to fully inclusive systems; and inclusive programs as key to overcoming the perceived discrimination and deviations associated with special education. Advocates of fully inclusive systems confront a long-established special education fraternity. Powerful actors assert that special education is not a place but a set of services individualized to students' learning needs, argue that the fixation on full inclusion is currently the most controversial idea in policy and practice for students with disabilities, and view any proposal to dismiss special education as "a totally nonsensical and impractical notion" (Kauffman & Hornby, 2020, p. 10; also Anastasiou & Kauffman, 2019; Kauffman & Badar, 2014).

9.1.2 Organization and Methods

This book chapter has three main components. First, independent case studies historicize the drafting history, policy orientation, and embedded ambiguities of each selected text and provide context to identify major theoretical and substantive processes. Second, we compare and contrast the nature and function of the processes and map both interconnected vantage points and discontinuities. Following, the data serve as the basis for a brief discussion about which document has established the

key concepts, created the most acceptable processes, and is impacting on the current global progress of the inclusive agenda. Two caveats are in order. First of all, decades of energetic professional debate have not resolved issues of placement and this piece is not intended to prescribe or proscribe different visions of inclusive schooling; rather, it is conceptual and reflective. Second, the international library on inclusive schooling holds far more than three documents. While this paper is bookended by the Jomtein conference and GC4, we recognize that later offerings such as the CRPD Committee's Concluding Observations and the 2030 Agenda for Sustainable Development will reshape the implementation of inclusive schooling yet again (e.g., Byrne, 2019; Mazurek & Winzer, 2022; UN, 2018).

9.2 Global Policy Context

As part of their strategic plans for international education development, the UN and its agencies have created, highlighted, and monitored the ideological underpinnings and formal policy commitments of the global inclusive agenda. They declare in favour of the inclusive approach and over the past three decades have endorsed and aired the principles and practices in multiple policy texts and purport the ideas as the international norm and standard (e.g., UN, 2018; UNESCO, 2018, 2020). Scholars have grappled with describing and theorizing the links between global education governance and the inclusive agenda elsewhere (e.g., Kiuppas, 2014; Magnusson, 2019; Winzer & Mazurek, 2016). Using the case studies below and the later comparisons, the present paper interrogates how inclusive education is constructed in the *Salamanca Statement* crafted under the aegis of the United Nations Educational Scientific and Cultural Organization (UNESCO) and in Article 24 and GC4 from the UN General Assembly.

9.2.1 The Salamanca Statement, 1994

The internationalization of the inclusive schooling movement can be dated from the 1990 World Education Conference held in Jomtein, a town on the Gulf of Thailand. The meeting spurred Education for All (EFA), an ambitious program that defined education within a global development agenda and nurtured aspirations for universal education (UNESCO, 1990). Limited co-operation among multilateral institutions during the 1990s hindered tangible action following the Jomtein conference. Still, the dominant themes that included a focus on underprivileged groups and universal primary and secondary education resonated with notions of inclusive schooling. The Jomtein resolutions sparked global diffusion of the inclusive agenda and provided strong intellectual antecedents to the 1994 World Conference on Special Needs Education organized by the then Special Needs Education department at UNESCO's Paris office in conjunction with Spanish educators. Held in Salamanca, the

conference maximized the opportunities created by the agreements made at Jomtein and, by UNESCO's own account, "proved a watershed for the global agenda" of inclusive schooling (UNESCO, 2018, p. 2). Within the theme of 'Access and quality' a host of paradigmatic changes created a conceptual coup that delineated "a world-wide consensus on future directions for special educational needs education" (UNESCO, 1994, p. iv).

Participants forged alignments with Jomtein's visions of EFA, revisited UN soft laws such as the *Standard Rules for the Equalization of Opportunities for Persons with Disabilities* (UN, 1993), and incorporated a host of resolutions and recommendations from multiple sources, bolstered by telling practices from world experiences. The gathered data underlined how the existing value framework no longer fit social realities. It was equally clear that the special education paradigm needed more than a simple reorientation: a refreshed vision erected on "new thinking" was more in order (UNESCO, 1994, p. 10). After considerable discussion, the meeting reached consensus under the rubric of inclusive schooling. The brief *Salamanca Statement* articulated the core theoretical issues; the accompanying *Framework for Action* detailed a purposeful and deliberate set of activities to direct the agenda (UNESCO, 1994). Despite their "clear and forceful policy on inclusion" (UNESCO, 1994, p. 21), the Salamanca participants failed to tender a working definition; rather, they presented what Magnusson (2019) described as "an amalgam of ideals." One thread linked inclusive schools to a broader campaign to create welcoming communities and inclusive societies. Another circumvented the commonplace practice of identifying inclusive schooling with students with disabilities: it expanded the constituency to encompass all those deemed different, disadvantaged, or with unmet learning needs. Important to the purpose of this paper, delegates discarded the medical model that reduces disability to individual bodily pathology and consequently creates a perceived need for protection and care. Instead, they claimed new paths that view disability as a socially produced injustice and shifts the balance toward challenging and eliminating disabling barriers.

Conversations about the methodological and organizational facets of inclusive schooling distilled into a set of interwoven thrusts predicated on the social model. One addresses the inability of education institutions to accommodate all students, directly resulting in marginalization, discrimination, and exclusion. Delegates demanded "major reform of the ordinary school" to remove the barriers that hinder access so that all children could "learn together, wherever possible, regardless of any difficulties or differences they may have" (UNESCO, 1994, pp. 6, 11). A parallel theme sought to move students with disabilities from outsider to participant status. The text echoed the *Standard Rules* and repeated the Jomtein recommendation that "Steps need to be taken to provide equal access to education to every category of disabled persons as an integral part of the education system" (UN, 1993, Rule 6; UNESCO, 1990, Article 3; UNESCO, 1994, p. 4).

The *Salamanca Statement* is at once idealistic, vague, and replete with ambiguities and redundancies. A third theme plays a straddling role. The drafters largely abandoned the assumption propagated by medical models that persons with disabilities need shelter, welfare, and the help provided by specialized disciplines. Even so,

they retained the separate, segregated placements found in special education. The text stipulated that a child with a disability should attend the neighborhood school "that would be attended if the child did not have a disability" but also noted that special arrangements may be necessary as "the most suitable education for a relatively small number of children with disabilities who cannot be adequately served in regular classrooms or schools" (UNESCO, 1994, pp. 12, 17). Upon, for example, clear demonstration that a general setting is inadequate to meet a child's needs or if the welfare of the child or other children requires separation. Special placements are especially apt for students with sensory disabilities, those deaf, blind, and deaf blind.

9.2.2 Article 24 of the CRPD, 2006

After almost 5 years of intense work by the Ad Hoc Committee (the body charged with drafting the treaty) the UN General Assembly unanimously adopted the *Convention on the Rights of Persons with Disabilities* at its 61st session in 2006. Unlike the Salamanca agreement that was written in the moral grammar of the international community, the CRPD is a core UN human rights tool with the force of binding international law. To date, it represents the clearest expression of rights for persons broadly described in the text as "those who have long-term physical, mental, intellectual or sensory impairments" (Article 1). The negotiations that produced the CRPD were effusively praised for inviting disabled persons' organizations (DPOs) to play prominent roles. DPOs actively embedded the social model as a foundation for disability policy: they used it to underpin agreement among that the medical model of disability had to be abandoned and that significant social transformation be undertaken. Degener (2014) observed that the ensuing movement from segregation to inclusive modes provoked little controversy and eventually wove through numerous treaty articles such as living independently and participation in political and public life. In two areas, however, the debate was protracted and contentious: the right to work (Article 27) and, our interest here, the right to education (Degener, 2014; Degener & Begg, 2017; Kayess & Sands, 2020).

For both member states and DPOs, the application of the right to education created fractious negotiations. When the Chair of the Ad Hoc Committee introduced the first draft of what would become Article 24 at the third session in December of 2003, the circulating principles of social transformation prioritized inclusive schooling. Yet even a shared imagining in favour of inclusive modes did little to temper the spirited and ongoing debates. The basic question of what to do about special education emerged as "one of the most difficult and debated questions regarding the right to education of persons with disabilities" (de Beco, 2014, p. 284). The drafters were constantly preoccupied with whether inclusive schooling and special education were close cousins, separate options, natural antagonists, or totally incompatible, together with the embedded issue of whether students had a right to choose between special and general schools. So intense was the issue that it was debated

over 3 days with more than 100 interventions from member states and other delegates (Kayess & Sands, 2020). Some countries and DPOs argued for the maintenance of multifaceted and flexible systems that balanced inclusive education and the continuance of special education. Amplifying the debates at Salamanca, others sought to make inclusive education the norm, special education the exception. An opposite faction championed whole-system inclusive approaches with all schooling for all students with disabilities grounded in general classrooms.

As we expand on below, ongoing drafts of Article 24 attempted to find compromises but, in the end, failed to achieve equilibrium. A delicate consensus calls on State Parties to "ensure an inclusive education system at all levels" so that "persons with disabilities are not excluded from the general education system on the basis of disability" (Article 24, 2). It is noteworthy that the drafters echoed the *Salamanca Statement* and accorded persons deaf, blind, and deaf blind a dispensation. Referred to as the *sensory exception*, it allows education in special schools delivered in appropriate languages and modes such as sign language and braille (Article 24, also Article 30). The message of full inclusion broadcast by Article 24 seems clear; in reality, it continues the legacy of elastic concepts noted in the *Salamanca Statement*. Not only does it omit a definition of inclusive schooling but it muddies the intersection between full and partial inclusion. Another primary shortcoming lies in attempts to neutralize, but not entirely abandon, special education. Despite extensive lobbying from those wanting to retain alternative placements, explicit references to special education were removed during the sixth session of the Ad Hoc Committee, although alternate support measures in exceptional circumstances were still allowed. By the seventh session, agreement on the education article was close, but the lingering options for alternate settings remained problematic. At the eighth and final Ad Hoc Committee working meeting in August, 2006, compromises on CRPD articles related to legal capacity, the integrity of the person, and education were all forged in the last hours. For Article 24, the final compromise eliminated caveats about alternate measures and exceptional circumstances. Still, the formal version neither expressly permits nor excludes separate education. It does not argue that special schools violate the Convention, prevent States from establishing special schools or compel them have them, and does not explicitly state that all students must be placed in fully inclusive settings (de Beco, 2014; Degener & Begg, 2017; Kayess & Sands, 2020; McCallum, 2020; UNESCO, 2020).

9.2.3 CRPD Committee, 2009

To conform to the UN monitoring process, each major UN human rights convention has an attached committee that essentially tracks progress and conformity to the prescribed goals in ratifying countries. The CRPD Committee, created in 2009, interprets, clarifies, and elaborates the meanings of the principles and provisions of the CRPD, guides implementation in ratifying countries, produces general comments on specific themes, and undertakes a complicated monitoring cycle to evaluate

the legislative, judicial, policy, and associated measures that ratifying countries pursue in compliance with the treaty.[2] Between the first session in 2008, its first report in 2011, and 2015, the CRPD Committee amassed more than 30 country reports. It acknowledged that progress had been made in international legislation for, and policies on, inclusive schooling but also identified "profound challenges" facing State Parties (UN-CRPD Committee, 2016, para. 3). Based on the widely reported lack of access to inclusive education and the dominance of segregated schooling worldwide, education placement was the chief issue. Evidence that many ratifying countries violated the right to education of their children with disabilities then spurred the fourth general comment titled *Right to inclusive education,* adopted by the UN General Assembly on August 26, 2016.

General Comment #4 includes a "powerful educational, social, and economic case" in support of the inclusive agenda. Adding to its overarching motif that inclusive schooling is first and foremost "A fundamental human right for all learners," GC4 defines the core features (UN-CRPD Committee, 2016, paras. 2, 10). It asserts that inclusive schooling is the only means to ensure the right to education for persons with disabilities, is vital in taking action against structural injustices and inequalities, protects the rights and equality of persons with disabilities, maintains norms of nondiscrimination, and provides all students parallel social and education experiences and benefits. Another key claim contends that inclusive schooling contributes to human capital formation: not only can it provide the quality education, social development, and economic status necessary for full participation in political and public life, but it is the primary means by which persons with disabilities can lift themselves out of poverty and be safeguarded from exploitation.

A primary issue for the CRPD Committee lay in clarifying what Article 24 did not: that is, whether inclusive education requires State Parties to dismantle and abolish segregated forms of education in favour of access to general education for all. To animate the argument, GC4 traces the boundaries between *exclusion, segregation, integration,* and *inclusion.* Important to this discussion, segregation is described as occurring "when education is provided in separate environments designed or used to respond to a particular or various impairments, in isolation from students without disabilities" (UN-CRPD Committee, 2016, para. 11). The text restates prohibitions on discrimination drawn from human rights documents such as the UNESCO *Convention Against Discrimination in Education* (1960) and defined as a key term in Article 2 of the CRPD. It articulates the widely-accepted view that as the right to non-discrimination includes the right not to be segregated, segregation for any reason is a denial of human rights. With schooling in the mix, anything short of full inclusion is segregation and an infringement of the right to non-discrimination.

[2] Including GC4, there are now seven thematic studies. Article 12 on equal recognition before the law was the first. Following were themes on accessibility (Article 9), women with disabilities (Article 6), living independently (Article 19), equality and non-discrimination (Article 5), and participation by disabled persons in monitoring the treaty (Article 33). A thematic comment on work and employment (Article 27) is currently under consultation.

Special education is indicted as an intractable problem of discrimination and marginalization. GC4 insists that processes by which students are routinely separated operationalize and sustain systemic institutional inequality; conflict with established human rights decrees; are stigmatizing and inherently discriminatory; perpetuate the medical model; and do little to undo the structures that maintain hierarchies of ability and disability. Special schools are educationally bankrupt: students are "isolated from their peers and receive an inferior quality of education" (UN-CRPD Committee, 2016, para. 3). The best hopes to curtail segregation and effectively attain inclusive goals are predicated on what Byrne (2019) describes as a "rights-compliant transition from segregated to inclusive education" (p. 1) that will eventually serve to delimit, restructure, or eliminate special education settings.

GC4 was drafted against the backdrop of Article 24 but substantially expands the core rights. At the very least, it broadens the scope of the right to education for those with disabilities from only requiring State Parties to ensure the right to education to explicitly requiring inclusive education and consequently adds complicated nuances to the inclusive conversation. Given its rigorous and non-negotiable set of precepts, it is perhaps not surprising that the characterization by Anastasiou and colleagues of GC4 as "a controversial interpretation of the CRPD" (2020, p. 3) captures a wealth of critiques. Common disputes centre on GC4's narrow interpretation of the right to education, over-interpreting what the drafters of Article 24 intended, and contradictions between Article 24's directives and the norms and obligations of prior UN documentation. As examples, some countries simply dismiss GC4: they see it as a useful source of guidance on Article 24 but "not a legally binding source of State Parties obligations on the right to education" (McCallum, 2020, para 4). Others warn that GC4's promotion of schooling as solely a question of rights attaches too much weight to location. In making general classroom placement the sole option, it diminishes sensitivity to instructional parameters: not only is appropriate instruction forsaken for equality of experience, but it overlooks the individual needs of special learners (Anastasiou & Kauffman, 2019; Kauffman & Hornby, 2020).

9.3 Comparison of Key Themes

The previous case studies historicized three documents vital in the global pursuit of inclusive schooling; thematic analysis of the dialogue shook loose an array of issues. In the following section, we are parsimonious in the units addressed and focus on four themes relevant to expectations about education placement. Sub-plots ripe for additional development such as reasonable accommodations, teacher training, and fiscal considerations are beyond the scope of this paper.

- *Disability is a social construction.* By the time of the Salamanca conference, the medical model of disability had become unfashionable. Salamanca crystallized a trend to the development of disability policy founded on a shift from conceptualizations of disability as a negative condition that requires care and welfare to a

belief that disability exists because of social attitudes toward human differences, not because of difference itself. The CRPD larded the social model with meaning: it became "the most successful dictum" (Degener, 2014, p. 29) and an important rationale for action. Of note, but beyond the scope of this paper, after 2012 the documentation and rhetoric of the CRPD Committee consistently used the phrase *human rights model* rather than social model. (See Degener, 2016; Lawson & Beckett, 2020, for a discussion).

- *Inclusive schooling is a human right.* The discourses share a belief system derived from a script based on the right to education and tied to the precept of human dignity, described by Degener (2016) as "the anchor norm of human rights" (p. 3). The *Salamanca Statement* acknowledged the dignity and worth of people with disabilities; the concept of human dignity is recognized numerous times throughout the CRPD. Among its goals of education, Article 24 itemizes the full development of human potential and the sense of dignity and self-worth (Article 1); GC4 understands those with disabilities as citizens with equal rights and places them within the ambit of international human rights. Each document addresses schooling at the level of rights and values. Salamanca "reaffirmed the right to education of every individual" (UNESCO, 1994, p. vii); Article 24 recognizes inclusive schooling as a human right. GC4 refines and actively develops Article 24's view of inclusive schooling: it interprets it as an overt expression of human rights and portrays full inclusion as indispensable in sustaining a positive spiral in pursuit of participation, equity, and non-discrimination.
- *The general classroom is primary.* Each text is defined by the centrality of inclusive schooling. Each nurtures the hope that inequality and exclusion can be overcome or at least ameliorated by school structural changes; all speak to the progressive removal of barriers and discriminatory practices that impede the right to education for persons with disabilities. In terms of implementation, each document sees inclusive education as primarily place related, premised on the general system as the norm or baseline, and postulate engagement with general systems and classrooms as the main criterion by which to gauge success. Each enjoins access to the regular curriculum. The Salamanca documents call for "additional instructional support" and curricula "adapted to children's needs" (UNESCO, 1994, p. 22); under Article 24 (2, d), States must undertake to provide reasonable accommodations and effective support measures. GC4 insists that, compared to an education in a general setting, special education is pedagogically meaningless and ineffective. In a general classroom, flexible curricula and teaching and learning methods can be adapted to different strengths, requirements, and learning styles (UN-CRPD Committee, 2016, paras. 12, 72).
- *Special education and inclusive schooling cannot co-exist*. The tensions surrounding education placement are most clearly explicated in contentious debates about the co-existence of full inclusion and special education, amplified (but not clarified) by the puzzling ambiguities that pepper the texts. For example, the ambivalent boundaries of the Salamanca messages permit "a multitude of interpretations of what inclusion can mean" (Magnusson, 2019, p. 21), all largely shaped by the theoretical perspectives of the reader. Parties variously regard the

text as the key turning point in the disciplinary formation of a field of inclusive schooling or as the onset of a historic progression from segregation to full inclusion; others argue that the meanings attributed to inclusion no longer mean what was agreed at Salamanca or that the documents really mean full inclusion, only waiting for Article 24 to fill the void (e.g., Ainscow, 2016; Heyer, 2021; Hunt, 2019; Migliarini, Stinson, & D'Alessio, 2019). Still, a literal reading shows that using the texts to validate precepts of full inclusion steps beyond the precise textual messages and meanings. A truly inclusive policy would have seriously reduced or eliminated options for special schools. But the drafters did not propose a totally transformative agenda. They endorsed progressively reconfiguring special education to create wider access to general settings for students with disabilities but stopped short of disbanding it altogether in order to offer students the best opportunities for development within a range of settings.

Conspicuous silences and omissions in Article 24 allow ambiguous interpretations that complicate its central guarantee of fully inclusive education systems. It neither expressly permits or excludes special education and therefore fails to foreclose the possibility of multiple lenses. In contrast, GC4 disavows any leeway for State Parties built on its thinking that "Full inclusion is not compatible with two systems of education: mainstream and special/segregated education systems" (UN-CRPD Committee, 2016, para. 39). GC4 disparages policies formulated on the basis of difference and holds that education in any segregated settings is not inclusive education within the meaning of Article 24. Save for the general classroom, it disempowers all sites and frames them as illegitimate or inferior. Special placements, even as an exception, are an exercise in discrimination.

9.4 Discussion

The present study focused on the highly visible dimension of education placement as interpreted in three UN documents. The individual drafting histories indicate that each selected text implicitly signaled a new milestone and standard for inclusive schooling by changing assumptions about the right to education and the values, priorities, and policies necessary to develop and sustain appropriate learning environments for all pupils with disabilities. The *Salamanca Statement* introduced rights-based inclusive approaches as the priority but retained safeguards for individualized decisions for students with disabilities in cases where there are "compelling reasons" for doing so (UNESCO, 1994, p. 11). Article 24 is the first binding agreement to enshrine the principles of inclusive schooling into international human rights law. GC4 enhances and magnifies Article 24's justification for full inclusion. It attempts to naturalize the idea of a one-track model to the exclusion of all other options and clearly anticipates the demise of special education.

Comparison of the themes show that foundational belief systems concerned with models of disability and inclusive education as a right are markedly consistent. Each

narrative draws authority from the social model of disability. All employ the language of rights; cement the human rights approach as a universal good; define the rights of persons with disabilities as an issue of human rights; call upon the global community to assure these rights; and regard inclusive schooling as a human right and social ideal. They further agree that the inclusive space must be constructed within the general education framework; demand reconstruction of entire education systems and school cultures to eliminate long-standing inequalities; theorize inclusive schooling as the primary and beneficial mechanism for educating those with disabilities; and involve an explicit assertion that the community of nations has an obligation to guarantee parity of participation for those with disabilities. Shared agreement about the ideological charter counterpoints different conceptual boundaries and continuing contestation of Berg's (2007) dueling polarities of full and partial inclusion. With the *Salamanca Statement* on one side and Article 24 joined to GC4 on the other, substantial divergence in cadence and stress surrounds the primacy of general classroom placement and the worth and longevity of special education.

The diverse ideological and operational identities of educational inclusion that emerged from our comparison of the selected documents is no small matter. It feeds into the well-established notion that inclusive education is a conceptual muddle beset by significant confusion about its fundamental tenets. Lacking a unity of purpose and universal processes, agreement on critical policy messages that include definitions, language, goals, programming, and student placement is far from firmly established within the research society and in the field (e.g., Hardy & Woodcock, 2015; Nilholm, 2021; Powell et al. 2015; UNESCO, 2018). This inevitably begs a final question. If the leading documents are divided on a world view of inclusive schooling, then what is the present scope and nature of the agenda on the global stage specifically related to education placement and Berg's (2007) dueling polarities?

By June of 2021, 182 of the 193 member states of the United Nations had ratified the CRPD and committed themselves to meeting its targets. However, a growing body of scholarly comment supports the view that the movement toward fully inclusive practice as enjoined by Article 24 and GC4 is not enjoying substantial policy traction on the global stage (e.g., Heyer, 2021; Human Rights, 2016; Hunt, 2019; UNESCO, 2018, 2020; Winzer & Mazurek, 2017, 2019). As examples only, there are strong doubts as to whether the articulated right to inclusive education has led to a new direction in policy making (de Beco, 2014). Ratifying countries have undertaken obligations to move as quickly and effectively as possible toward realizing Article 24 but many jurisdictions show little evidence of direct and powerful links between international policy and local practice (Mazurek & Winzer, 2022). Only a small minority of States have taken systematic legal steps and policy reforms to target the provisions of Article 24. Just 68 percent of countries delineate inclusive schooling in laws, policies, plans, or strategies (UNESCO, 2020).

The narratives under discussion hold schools complicit in building barriers to participation and draw attention to reforming and transforming the design of education systems. But the anticipated reshaping of systems is elusive: seminal ideals of

school restructuring rarely occur in practice (UNESCO, 2018). The hegemony of special education is relatively unscathed; dismantling, restructuring, or eliminating special education settings has not, to date, been markedly successful. In fact, the CRPD Committee concedes that for most persons with disabilities today, schooling is still available only in segregated settings (UN-CRPD Committee, 2016, para. 3). The rhetoric of policy making at the global level has outpaced change on the ground and accounts of success are seriously incomplete. Despite ongoing intervention from international bodies testifying to a growing understanding of the rights of those with disabilities, a stark gap lies between the CRPD's aspirational text and the realities of local and national contexts (Human Rights, 2016; Hunt, 2019; Slee, 2020; Winzer & Mazurek, 2017). In lieu of the fully inclusive systems pressed by Article 24 and GC4, present processes are consistent with the more open- textured understandings of partial inclusion articulated in the Salamanca documents.

It is important to recognize that this statement about the ongoing precedence of the *Salamanca Statement* contains several important dimensions. First of all, by no means are we suggesting that every country with a multilevel architecture of education has taken authority and inspiration from the Salamanca agreement. For example, the directives profoundly influenced legislation and policy in Australia and Europe, with a particularly strong emphasis in the group of states that form the European Union, but had little impact in North America (Winzer & Mazurek, 2020). However, in the sense that the *Salamanca Statement* contains the main features to attain and sustain agendas for inclusive schooling and do not greatly disrupt established systems and routines, they define reachable goals for many countries. It is common practice for local policy makers to take stock of both inclusive practice and special education so that inclusive models function alongside robust systems of categorical special schools.

Second, a number of observers reasonably argue that not a great deal of sustained progress toward full inclusion and the elimination of segregated education has actually been made since the international breakthrough at Salamanca (e.g., Boyle & Anderson, 2020; Nilholm, 2021; Slee, 2020). In the decade following the Salamanca conference, the appeal to the international community "to endorse the approach of inclusive schooling" (UNESCO, 1994, p. 10) created significant political and educational progress for the agenda. Considerable activity sought to draft laws, establish national plans, and define policy and operational frameworks. But enthusiasm waned and, as noted by Boyle and Anderson (2020) and confirmed other scholars (e.g., Entrich, 2020; Hunt, 2019; Winzer & Mazurek, 2019), many countries of the global North are "not really any closer to full inclusion than they were ten years ago" (p. 9). The loss of momentum means that countries with traditionally high inclusion rates continue to include students; in countries with more marginal rates, no improvement is visible. Some countries have become less inclusive in recent years; others see a marked backlash against inclusive schooling. The demand for non-inclusive settings has grown; exclusionary practices and segregated programs thrive (e.g., Ainscow, 2016; Boyle & Anderson, 2020; Entrich, 2020; Human Rights, 2016). 'All means all' has not expanded at the expected rhythm. Constant repetition by advocates to render the values and assumptions underlying the

paradigm as self-evident have remained somewhat unconvincing. Single education systems rarely exist- and seem unlikely to do so. Even ardent advocates wonder if Article 24 will fulfill its radical potential. Achieving fully inclusive systems of education, they say, is "no small feat, potentially even impossible" (UNESCO, 2020, p. 9).

This book chapter on the precepts and practices of education placement within the global inclusive schooling movement began with broad historical brushstrokes that painted the development and context of inclusive schooling in what are arguably the most important international texts related to the education of students with disabilities. UNESCO's 1994 *Salamanca Statement* framed the ideologies, policies, and practices and crystallized into a foundation for discourse for governments, DPOs, education authorities, and others to advance the inclusive agenda. Article 24's global model for participation and access proclaims inclusive education as human right, calls for inclusive education as the enabling strategy, and requires State Parties to achieve fully inclusive systems. The effects and outcomes of the treaty are promoted, controlled, and evaluated by the CRPD Committee. Its defining *General Comment #4* consistently interprets Article 24 to mean general educational environments and undertakes to delegitimize special education.

9.5 Conclusion

Comparison of the major themes drawn from the textual analysis revealed that the core ideals rooted in human rights are seen as a universal good and not the basis of dispute. However, little consensus exists on the attendant discourses and practices related to educational placement and special education. Despite the press by international organizations to elevate full inclusion to the governing ideology joined to the significant efforts to desegregate and deinstitutionalize students with disabilities, the inclusive agenda has not seen any great advances since the Salamanca agreement laid down the parameters. Different understandings of inclusive schooling translate into different implications and consequences for action. Full inclusion remains an advocacy priority, stalled at the level of discourse. Many countries appear unable or unwilling to undertake the obligations necessary to meet the targets of Article 24. Sites with established special education systems have not moved to fully inclusive systems; practice is far from deinstitutionalizing existing special education systems; special segregated programs remain an important part of policy and praxis. Many contemporary organizational forms align with the directions articulated at Salamanca and accommodate both general and special education. Overall, the model of partial inclusion remains axiomatic for reading the global inclusive landscape.

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Chapter 10
Research Trends in Discourses of Globalization and Cultural Identity

Joseph Zajda

Abstract The chapter critiques dominant discourses of cultural identities, environmental influences and forces of globalization. The author argues that, as imagined communities, national identities may well represent this idea in our collective memories and myths. Globalisation has contributed, among other things, to the strengthening of various cultural identities: religious, national, ethnic, and geographic. Current research trends in discourses of globalization and cultural identity demonstrate the nexus between cultural identities and environment. The chapter demonstrates that cultural identity research reflects a rich variety of phenomena in one's culture and environment affecting our identities, within cultural, social, emotional and behavioural spheres, and our quality of life and chosen life styles.

Keywords Discourses of cultural identity · Ethnic identity · Geographic identity · Globalisation · Global culture · Global identity · Human rights · Identity crisis · Identity politics · Ideology · Institutional identity · Language · Local identity · Migrant children · Multiple identities · National identity · Nation-building process · Religious identity · Social justice

10.1 Introduction

10.1.1 Defining Globalization

With reference to the nexus between cultural identity and globalisation we need to examine critically these two evolving globally and locally significant constructs. To begin with, globalization is not an easy term to define. There are numerous competing and contested definitions of globalization. The problem lies both in defining globalization, and understanding and critiquing its intended and unintended consequences on nation-states cultural identities globally. Definitions of globalization

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have varied from one author to another. Some have described it as a process, while others a condition, a system, a force or an age. In the last few years, there has been a virtual explosion of interest in globalization by comparative education scholars, and policy analysts (Appadurai, 1990; Carnoy & Rhoten, 2002; Zajda, 2021) What is 'globalization'? Is it a market-driven process, propelled by forces of consumerism that imposes a neo-liberal economic regime of trade relations, and which represents the ubiquity of global capitalism? If so, is it spearheaded by multinational conglomerates? Is it connected to the discourse about modernity (Robertson, 1992; Zajda, 2022)? Is it also driven by intensified modes of competition that compresses 'the time, and space aspects of social relations' (Giddens, 1990)? These are some of the questions arising from a critical perception of multi-dimensional globalization. In general sense, the phenomenon of 'globalization' refers to individuals and institutions around the globe being more connected to each other than ever before, to a quantum-like pace of the international flow of communication, capital, knowledge and other socially valued commodities, to consumer goods and services produced in one part of the world, and being increasingly available in all parts of the world, and to shifts in political and economic systems influenced by forces of globalization.

The term 'globalization' is used so widely today in social theory, policy, and education research, that it has become a cliché. As a construct, 'globalization' has acquired considerable emotive force among pro and anti-globalization researchers. Some scholars view it as a process that is beneficial—a key to future world economic development—and also inevitable and irreversible. Others regard it with hostility, even fear, believing that it increases inequality within and between nations, threatens employment and living standards and thwarts social progress. Economic 'globalization' is a historical process, the result of human innovation and technological progress. It refers to the increasing integration of economies around the world, particularly through trade and financial flows. The term sometimes also refers to the movement of people, in terms of labour, and desirable knowledge, including technological skills across international borders.

Do advocates of globalization desire participation, opening dialogical space, promoting cooperative power, or social equality? Evidence on this question resides with the former. Globalization has come to be associated with exacerbating social inequality, exemplified in the proverbial race to the bottom. In this race un-tethered capitalists seek to perfect a socially toxic formula that maximizes production and profit while minimizing worker and environmental protection. Popular and scholarly dialogue generally focus on these events, whether it be the outsourcing of labour from developed countries, the in-sourcing of capitalism that exploits local people and ecosystems, or the subsequent trade issues that emerge from these global outflows and inflows. Increasingly what is needed, however, is study of the systemic complexities associated with these relationships in light of the myriad examples in the social world, rather than myopic attention to a case or detached theorizing about an abstract trend. Progress in understanding globalization will certainly be made when the macro and micro can be viewed in light of each other, each analysis working towards emergent and tenuous theories about globalization. To know something of globalization is to look carefully, closely, and locally at its

manifestations, uncovering some element of its meaning, unearthing some dimension of its effects. While such an archaeological method of knowledge development is tediously slow, hampered by the shifting qualities of globalization itself, it provides some basis on which to extend an analysis of what globalization is and what it portends.

Ritzer and Rojek (2020) offered a useful analytical lens through which to view the macro and micro areas of globalization. Advocates of glocalization see these new syntheses as progress, an effect being people identifying as one. Opponents like Ritzer, however, characterize these same changes as illustrations of grobalization. Grobalization minimizes and trivializes the differences among people and places, affords them less ability to adapt and innovate, directs social processes that are deterministic and dominant, and represents people in commodified ways Heuristically, grobalization *others* people in the world such that they are no longer agents of and for themselves, but acted on by the ominously large and rationalized order of a global world. What is most troubling in considering major discourses about globalization in the social mainstream is the general failure to explore its incongruities, and worse, the opposition to engage in informed dialogue about presumptions embedded in globalization. Globalization and its neo-liberal ideology has been reified as *how things are* without a careful examination and subsequent debate of *both* (1) the ontological claims, diverse perspectives on what is happening and (2) its broad, social effects, along with views about possible alternatives to the current state of affairs.

What globalization has failed to create, in the case of China and many other societies who are major players in this economic system, however, is a robust dialogue about the nature, effects, and alternatives associated with its growth. Relying on what is narrowly *true*, in particular the principles of unsustainable market economics, globalization has jeopardized social stability, such as a safe environment, equitable access to resources, and protection of human labour, in the quest for greater profits. What is perhaps most disconcerting about this trend is not the effects that such obedience to often implicit principles has caused, as if these were not disturbing enough, but the concomitant subverting of free, open, and diverse discourse about the processes at work and their aims.

10.2 Cultural Identities

Cultural identity, as construct, and discussed in Chap. 1, refers to one's sense of belonging to a particular culture, based on various cultural categories, including language, nation, place, nationality, and various other individual characteristics, shaped by political and social dimensions of one's culture. Nationalism, argued Anderson (1991), is a narrative of national origins that creates imagined community amongst the citizens of the modern state. Anderson explains the sense in which the nation is an 'imagined community':

> The nation is imagined as limited because even the largest of them, encompassing perhaps a billion living human beings, has finite, if elastic boundaries, beyond which lie other nations . . . It is imagined as sovereign because the concept was born in an age in which Enlightenment and Revolution were destroying the legitimacy of the divinely-ordained, hierarchical dynastic realm . . . Finally, it is imagined as community, because, regardless of the actual inequality and exploitation that may prevail in each, the nation is always conceived as deep, horizontal comradeship (Anderson, 1991).

As 'imagined communities', national identities may well represent in our collective memories and myths (Anderson, 1991). With reference to the construction of national identity, and collective memory, it has been argued that such ideas build on 'the emphasis on a common history and history has always to do with remembrance and memory' (De Cillia et al., 1999, p. 154). The concepts of 'nation' and 'national identity' were examined by numerous scholars, including, Anderson (1991), Smith (2001), and Zajda (2017). They critiqued some of the assumptions about the discursive construction of nations and national identities. Their analysis of 'nation' and 'national identity' was informed primarily by the works of Anderson (1991), Bourdieu & Passeron, (1990), Hall (1997) and Smith (2001).

As discussed in Chap. 1, globalisation has contributed, among other things, to 'the strengthening of various cultural identities: religious, national, ethnic, and geographic' (Castells, 2006, 2010). The construct of cultural identity is associated with a reification of culture (similar to Marx's notion of 'reification'), which becomes a defining feature of the dominant discourse on identity (Bauman, 1996). Reification is the process of attributing concrete form to an abstract concept. Reification was used by Marx to describe a form of 'social consciousness in which human relations come to be identified with the physical properties of things, thereby acquiring an appearance of naturalness and inevitability' (Burris, 1988). Using the concept of reification, Marx tried to explain why workers accepted their labour and wages exploitation as natural.

Overall, forces of globalisation, together with global marketing have transformed the formation of one's cultural identity, and has manufactured a new consumerist and a global materialistic culture of commodification of the self. Zajda (2021) discussed critically the commodification of the self, within the construction of cultural identity. It is also argued that language plays a significant role in identity discourses, and is intrinsically connected to personal, national, and ethnic identity (Zajda, 2022).

10.3 Research Trends in Discourses of Globalization and Cultural Identity

Current research trends in discourses of globalization and cultural identity demonstrate the nexus between cultural identities and environment. We need to accept that we, as individuals, are located in a particular culture, where our identities are defined and shaped by major agencies of socialization, such as the family, the

neighbourhood, the peers, the school, and the media. Bronfenbrenner's (1979) definitive and popular model explains in depth, from a sociological perspective of major how agencies of socialization contribute to our identities, attitudes, values and behaviour patters. Individuals' particular attitudes, values, and behavior, including biases and discriminatory practices, are usually acquired, and shaped by a number of major agencies of socialization, such as the family, the peers, the school, the neighbourhood, and the media. Bronfenbrenner, influenced by his sociological perspectives of major agencies of socialization, and Lev Vygotsky's theory of language development within one's environment, as well as Kurt Lewin's study of human social behaviour, refined his earlier Ecological Systems Model (1979), by developing his new *Bioecological model of development*. The model combined both genetics and environment, which is reminiscent of Eysenck (1982), helps to explain more fully the complexity of social and cultural interactions contributing to human development and cultural identities.

Cultural identity research reflects a rich variety of phenomena in one's culture and environment affecting our identities, and our chosen life styles. In 'Major Discourses of Cultural Identities' Zajda (2022) examines critically the ambivalent and problematic relationship between the state, globalisation and the construction of cultural identity. His research findings demonstrate that language is intrinsically connected to personal, national, and ethnic identity. In terms of time, location and culture, the process of re-defining and consolidation of cultural identities has been one of a continuous social, cultural, political and historical transformation. He argues that global marketing affecting the formation of one's cultural identity has manufactured a new consumerist and a global materialistic culture of 'commodification of the self'.

Suzanne Majhanovich (Chap. 2, this volume) analyses Canadian identity. In 'The evolution of Canadian Identity as reflected through the Ontario secondary school curriculum', she argues that the concept of Canadian identity has evolved over the years from one highly influenced by Canada's colonial ties to a cultural identity that draws on the contributions from its diverse population. The author has discusses how Canadian identity has evolved and developed as reflected in the school curriculum in Ontario, particularly that curriculum dealing with the subject disciplines English, French as a second language, and History and Social Sciences.

In 'The globalization of human rights for a global citizenship: New challenges' José Noronha Rodrigues (Chap. 3, this volume) discusses conceptual interconnection between globalization and human rights. He argues for the need to combine the concepts of globalization, human rights, and global citizenship within organizational operations. The author concludes in his research findings that forces of globalisation have generated significant changes in the political, legal, and social sphere of global citizens, so that new and improved human rights are required for the dignity and defence of the human person and, in particular, for the collective rights of humanity, regardless of the geographical circumscription of the State in which we find ourselves.

Nitza Davidovitch et al. (Chap. 4, this volume) offer us a futuristic vision of leisure in a global culture. In 'Adult studies as a leisure activity: From exigency and choice', the authors argue that the research literature on leisure indicates that the

forms of leisure activity utilized depend on the learners' socio-demographic background and hence also on the life patterns to which they have become habituated, according to the continuity theory and the serious leisure perspective. Their survey, involving some 234 respondents with a diverse socio-demographic background, examined socio-demographic differences in gender, age, religiosity, marital status, level of education, and socio-economic status (SES). The authors' research findings demonstrated that respondents who chose to study Torah as a leisure activity were found to be mostly men, religious, and married. In contrast, the respondents who chose non-Torah enrichment studies as a leisure activity (the control group) were mainly women, mostly secular (non- religious), and non-married (single, divorced, or widows). Nevertheless, it is interesting to note that studying at leisure may require a certain level of financial security.

Joseph Zajda (2022) provides a case study of ways of constructing national identity by means of history textbooks in schools. In 'The discursive construction of national identity in prescribed history textbooks' he examines critically the process of identity formation. His data analysis of interviews with Russian history teachers demonstrated that most respondents agreed that the national identity was formed through the study of historical narratives, depicting significant events in the history of Russia. In addition, most respondents agreed, which was indicative of the political climate in the RF, that the primary value of history education in schools was education for national identity, patriotism, and citizenship education. The author concludes that his data analysis demonstrated the significance of ideology in discourse analysis data of history education, where nationalism and patriotism were defining, and continue to do so, the structure and the content of prescribed Russian history textbooks in schools across the RF. Discourse analysis data re-affirms the significance of the role of historical narratives in the development of historical consciousness and national identity in school history textbooks.

In another case study, Suzanne Majhanovich (Chap. 6, this volume) analyses how forces of globalisation and migrations have impacted on cultural identities of the newly arrived migrant children and adolescents in the school setting. In 'Canada's response to the Syrian refugee crisis. easing the transition to integration', the author critiques a program organised by a local school in London (Ontario) to ease transition to the Canadian education system for the migrant children with little or no knowledge of English. GENTLE, or the Guided Entry to New Teaching and Learning Experiences Centre has been designed to help the migrant children and adolescents in the school setting.

Globally, according to Sharon Tzur Adi Katz & Nitza Davidovitch (Chap. 7, this volume), social networks, learning technologies, and 'digital teaching tools are gradually becoming major learning and work tools, integrated in the different educational systems':

> The integration of digital technologies has changed the classical face-to-face classroom study space and transformed teachers and lecturers into figures that guide, direct, and mediate between the students and the study contents by means of an array of teaching methods (Sharon Tzur, Adi Katz & Nitza Davidovitch, Chap. 7, this volume).

In their 'The impact of social networks on student motivation and achievement', Sharon Tzur, Adi Katz & Nitza Davidovitch examine association between the contribution of social networks to social-academic interaction and the impact of both on learning motivation and academic achievements. The authors also discuss social media and various social media platforms, which influence one's evolving cultural identity. One of the examples used is Facebook, as a globally popular social network, with more than 2 billion users worldwide. The authors conclude that since social networks shape and construct cultural identities, reflecting the changing dynamics of evolving cultural identities, there is a need to include 'social networks in learning, which is particularly important for Generation Z, since a significant part of their life activities already takes place on social networks' (Tzur, Adi Katz & Nitza Davidovitch, Chap. 7, this volume).

Students from refugee backgrounds face many challenges, affecting their cultural identities, as a consequence of their previous life experience, and shaping their successful transition in a new school setting. In 'Contributing factors to refugee children's education and academic performance' Nina Maadad, I Gusti Ngurah Darmawan, and Salah Kutieleh (Chap. 8, this volume) discuss factors contributing to the education of Arabic Speaking refugee children. They identify how individual factors such as gender, country of birth, years absent from school, family factors such as parents' education and involvement, and other relevant social factors.

Margaret Winzer and Kas Mazurek (Chap. 9, this volume) when examining inclusive schooling for students with disabilities note that the core ideals are rooted in human rights. However, they argue that there exists a little consensus on the practices related to educational placement and special education. Despite the combined policy efforts of various international organizations to elevate full inclusion, as the governing ideology to desegregate and deinstitutionalize students with disabilities, the 'inclusive agenda has not seen any great advances since the Salamanca agreement laid down the parameters':

> Different understandings of inclusive schooling translate into different implications and consequences for action. Full inclusion remains an advocacy priority, stalled at the level of discourse. Many countries appear unable or unwilling to undertake the obligations necessary to meet the targets of Article 24 (Margaret Winzer & Kas Mazurek, (Chap. 9, this volume).

Finally, in 'Research trends in discourses of globalization and cultural identity', Joseph Zajda offers a synthesis of cultural identities affected by various environmental factors and forces of globalisation.

The above discussed diversity of cultural identity research reflects a complexity and variety of situations in our lives, culture and environment, which are constantly defining, shaping and changing identities, within specific cultural, social, emotional, behavioural spheres, together with chosen life styles, and our quality of life. Major discourses dealing with the construction of cultural identities, both locally and globally, demonstrate that our identities, as discussed in Chap. 1, are both ascribed and constructed identities, and embedded in our cultures. One could argue that it is possible to combine both traditional singular social identity, and other acquired

identities. We are likely to have multiple identities, based on race, ethnicity, gender, languages, education, age, sexual orientation, occupation, life style, and social class (SES).

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