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# **Evaluation of Motivation, Expectation, and Present Situation in 3<sup>rd</sup> Year Undergraduate Students of German Language and Literature at the University of Rijeka, Croatia**

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## **Abstract**

In this article a closer look will be taken on motivation, expectation, and present situation of third year undergraduate students of German studies in Croatia at the University of Rijeka. Due to the author's extensive experience in teaching translation classes from Croatian to German for undergraduate students in the third year, it is noticeable that most students have problems in certain areas, i.e. they are not able to correctly translate short Croatian texts into German in terms of correct grammar and syntax, even when words were explained in advance to facilitate the process of translation and upon extensive grammar practice in the first and second year of undergraduate studies. As studying a language also requires a lot of self-study and interest in the language being studied, it is certainly not enough just to sit in the courses at the university and do only the most necessary things to somehow pass the exams. It is essential to be engaged intensively with the country, the culture, and the people, to take part in exchange programmes, travel as often as possible to the country whose language you are about to learn, take the opportunity to communicate with native speakers, watch films or TV shows, read books or magazines in the target language etc. Thanks to the new technologies, nowadays one has almost endless possibilities to be exposed to the target language, even if one does not have the opportunity to travel to the destination country. But to what extent do students use what is available to them and are they at all motivated for the necessary effort of self-study? To answer these questions, a questionnaire was prepared to gain a deeper insight into the students' motivation to enrol German language and literature at the university, their expectations of what the language study would be like and the present situation in their third year of undergraduate studies. The evaluation of the questionnaire should provide information on the extent to which the students were familiar with what to expect from their studies, how they deal with the requirements and challenges, to what extent they are willing and prepared to do something outside of the courses to improve their

language proficiency autonomously, what the study of German studies should serve them in the future and if self-study has a visible impact on their language proficiency, i.e. if students who do a certain amount of self-study do have better results.

**Keywords:** German as a foreign language, foreign language acquisition, German studies, self-study, self-assessment

## Introduction

Learning and studying a foreign language is a lengthy process that requires a lot of motivation and work. Unlike learning the mother tongue, it is not driven by an inner need that is present in young children because they need to communicate with the outside world. Moreover, up to a certain age, children learn a language intuitively by imitating what they hear from the adults around them. Foreign languages are usually learned at a later age, at school or in language courses. Nowadays, in most European countries EFL is learned at preschool age because it is the lingua franca and English must be spoken in all professions. However, other foreign languages such as German are not taught at such an early age.

In Croatia, German is taught less and less in elementary and secondary schools and is usually taught as a second or third foreign language, so the language skills of students starting German studies are not at a high level. In previous years, a minimum level of B1 according to the CEFR was required to begin studying German, but for the past three years there have been no requirements regarding language proficiency, so students who have never learned German before can enrol in German studies, making it more difficult and requiring much more motivation for extra work and self-study to achieve an adequate level of proficiency.

The program is divided into three sections: linguistics, literature, and language practice. Students are required to take language tutorials in which they learn grammar and writing skills and expand their vocabulary. In the first two years, the focus is on grammar and writing skills; in the third year, they read short German and Croatian texts on various topics, familiarize themselves with terminology, and then translate short texts on similar topics into German and vice versa.

Especially those students who did not learn German in elementary or secondary school need to deepen their language skills, which requires a certain motivation to learn and self-study. Another factor is the expectations with which they enter German studies. Do they know what is expected of them, and are they enrolled for the right reason? What do they want to do after they graduate? And to what extent have they chosen the right course of study for them? Sometimes you get the impression that they have a completely wrong idea of what it means to study a language. Most of the time, they expect something like a language course and are then overwhelmed by



what is demanded of them: a lot of reading and getting to know German authors and literary epochs, morphology, syntax, semantics and, on top of that, good language skills.

### **Foreign language acquisition**

Foreign language acquisition has been studied over a long period of time and one of the factors involved in foreign language acquisition is the age of the learner. According to Apeltauer (1987), it is assumed that children have a natural aptitude for learning (foreign) languages, so that they can acquire them more easily than adults. It was even assumed that this ability is lost with puberty and that it is very difficult to learn further languages after that. Further research found that learners master different areas faster depending on their age because they have different areas of focus.

There are several hypotheses about how a foreign language is learned:

The *contrastive hypothesis* is based on contrastive linguistics and behaviourist learning theories. The framework is provided by contrastive analyses of linguistic and communicative units; semantic, lexical, and grammatical structures of two or more languages are compared. The *contrastive hypothesis* was coined by Fries (1945) and Lado (1957). The comparison of two languages is used to predict interference and transfer and thus to support foreign language learning and teaching. The focus is on sentence and phonetic structure and distributional differences between the native and foreign languages, while lexical and semantic aspects are ignored and no pragmatic comparisons are made. Problems in the comparison of two languages occur when certain units are missing in one language, e.g. the absence of articles in Russian or Croatian. This leads to various difficulties in learning a foreign language, depending on the native language of the learner.

The *identity hypothesis* assumes that the acquisition of the first and second languages is identical. The basis of this theory is nativism, i.e. Chomsky's hypothesis, in which he assumes an innate language acquisition mechanism, which he calls LAD (Language Acquisition Device). In this context, the development of linguistic competence in the second language depends on the skills acquired in the first language and on when one starts learning the second language. This theory states that second language acquisition follows the same principles as first language acquisition and uses the same linguistic structures. Thus, in both first and second language acquisition, the learner uses innate potentials and cognitive processes from first language acquisition to acquire the second language in the same pattern, i.e., in the same order, as he or she once acquired the first language.

The *interlanguage hypothesis* builds on the behaviourist learning theory of Skinner and the nativist learning theory of Chomsky. This hypothesis assumes that a foreign language is learned by first creating an intermediate language (interlanguage) or learner language in learners. The interlanguage hypothesis was first coined by Reinecke (1935) and later further developed and introduced into foreign language

acquisition research by Selinker (1969), who also coined the term interlanguage (abbr.: IL). Basically, this interlanguage is assumed to contain various elements that include features of both the first and second language, but also to have independent features that cannot be derived from either the first or second language. Interlanguage is subject to constant change and rapid evolution as the learner is constantly confronted with the language being learned and receives new input.

The *interdependence hypothesis* can be traced back to Cummins (1984). His interdependence or iceberg hypothesis describes the relationship between first language and learning another language. He assumes that the degree of literalness of the native language is responsible for the success of second language acquisition. Cummins sees the interdependence between the native language and the second language in the cognitive-academic language domain, that is, in the mastery of morphology, grammar, vocabulary, reading comprehension, and writing skills. Cummins developed the iceberg model, according to which there is a Common Underlying Proficiency (CUP) beneath the surface of the L1 and the L2, i.e., a common literalness of languages that is responsible for the learning of both languages. According to Cummins, each language has certain surface features, but beneath this surface are the literalities that are common to all languages.

In the *interaction hypothesis*, the competence of a language is assumed to be acquired through a particular form of interaction, the negotiation of meaning. The negotiation of meaning is nothing more than a conversation based on an emergent problem. The problem is solved by discussing it with an interlocutor and following this interaction the speaker may change his problematic statement. This type of interaction sets in motion cognitive processes that are characteristic of the onset of skill building in a language. In the interaction hypothesis, Krashen's (1985) input hypothesis and Swain's (1985) output hypothesis are combined in the form of interaction. Successful language acquisition requires not only comprehensible input but also comprehensible output.

In the 1990s, it was recognised that there were not only qualitative but also quantitative differences between first language acquisition and the acquisition of other languages, thus several new models were developed to describe multiple language learning. Concepts of multilingualism, learning strategies, and learning approaches have been developed. In addition, concepts such as learner autonomy and learner consciousness are appearing, indicating that the learner is now becoming the focus, as there are individual differences in foreign language acquisition that are not considered in the older theories.

The *Dynamic Model of Multilingualism (DMM)* focuses on a dynamic development of individual learning processes, the multilingual speaker is seen as a complex psycholinguistic system combining individual language systems from the L1, the L2 and the L3. Here, the theory assumes that all languages that exist in this multilingual system have an impact on the overall system. One focus of DMM is to study the

dynamics and change of the individual language system as it evolves due to biological factors and the behaviour of living organisms. The second focus is on creating a model of multilingualism that accurately describes the dependent and independent variables and makes predictions about how the multilingual system will evolve.

Like the DMM, the *language-switching model* of Williams and Hammarberg (1998) is a socio- and psycholinguistic model that examines the dynamic development of individual learning processes. In the language switching model, the language under study is considered L3, regardless of how many languages are learned. All languages learned prior to the language under study are referred to as L2s and thus take on different roles and functions, regardless of how the L3 relates to them chronologically or structurally. Switching between languages, code-switching, does not occur unintentionally; rather, the learner consciously decides at which moment to use which language. Basically, the language-switching model assumes that the learner can distinguish well between the languages already learned and those yet to be learned, but that there is mixing or interference between those languages. It also assumes that literality in the different languages is usually at the same level.

Hufeisen's (2003) *factor model* is linguistically oriented, where the L2 has a very large impact on the learning of other foreign languages, as it is the cornerstone for learning other foreign languages. In the acquisition of the L2, competencies are acquired that are not present in the acquisition of the L1 or at the beginning of learning the L2. Hufeisen divides the factors for learning a foreign language into learner-internal and learner-external factors. In this context, Hufeisen attaches great importance to interlanguage and sees motivation as another important factor in foreign language acquisition. Motivation occurs only when learning an L2, since it is not motivation that is responsible for the acquisition of the L1, but an inner need for communication (intrinsic motivation). The situation is different with the L2, since the learner has to put in some effort when acquiring the L2, the natural need for communication is no longer sufficient and motivation is the most important factor. Thus, L1, L2 and further foreign languages are not all acquired in the same way, but differ in their linguistic, internal and external conditions.

Aronin and O'Laoire's (2003) *ecological model of multilingualism* is sociolinguistically oriented and views language as an important factor in an individual's identity construction. The term "ecological" refers to the cultural contexts in which multilingualism is studied. At EMM, multilingualism is understood as a collective state in which multiple individuals are multilingual and multiple languages are in contact with each other. It focusses on the language systems and language codes that an individual uses, whereas multilingualism refers to a single individual and the total number of languages he or she uses, which also includes other factors such as meta-linguistic knowledge, social influences, emotions, personal attitudes, and cognitive aspects, i.e., individual abilities and resources, but which reflect basic features of multilingualism. It can be concluded that each person carries a very complex form of

multilingualism, which speaks for a very individual language acquisition and makes it very difficult to predict the course of the language acquisition process.

Groseva (1998) postulates in her *foreign language acquisition model* that the learner draws on source language knowledge and formulates hypotheses in a meta- or target language, which he then verifies and corrects through feedback from his interlocutor. It assumes that exclusively learner-internal factors are responsible for foreign language acquisition and attributes great importance to the L1 and the L2 for the acquisition of other foreign languages. Groseva assumes that L3 acquisition does not begin until adolescence, so that linguistic experience in L1 and L2 can already be assumed. Therefore, according to Groseva, L3 acquisition is more conscious and intensive than L2 acquisition, which raises the question of how the L2 influences further language acquisition processes.

### **Objective and Starting Position of the Study**

According to Hufeisen's factor model, there are certain factors in the acquisition of an L2 or L3, one of which is motivation, since an internal need for communication, as is present in learning the L1, is not found in learning an L2 or L3. Motivation seems to be an important factor in learning a foreign language that makes the learner engage with the foreign language, expose himself to the foreign language, and learn by himself to the required extent. Groseva also points to the motivational factor for learning a foreign language and assumes that learner-internal factors predominate in language acquisition.

The starting point of the study was the author's impression that students lack motivation for study and self-study and exposure to the target language. The student groups in German Studies at the Faculty of Humanities and Social Sciences at the University of Rijeka are not homogeneous, because some students have learned German as a first foreign language, others as a second foreign language at school, and recently even students who have not learned German at all can enrol in German Studies. As a result, students have to spend more or less time on self-study and language improvement. At the beginning of German studies teachers always point out that it is very important to invest some effort in self-study, to take advantage of student exchange programmes such as Erasmus, or to watch German TV and read German books or magazines that interest them in order to get in touch with the target language.

According to the authors mentioned above, it is inevitable to expose oneself to the target language and interact as much as possible with native speakers in order to acquire as much knowledge as possible. Most students do not feel the need to use the target language, even in class, because they can communicate with their peers and the teacher in their native language.

The aim of this study is to gain a deeper insight into the students' self-assessment, their motivation, their views on self-study, their expectations of German studies and

their fulfilment and, in a final step, to show a correlation between expectation, effort invested and language competence.

## **Methodology**

This research is a qualitative research. The aim of this research is to investigate third-year German language students' self-assessment of language proficiency and motivation for self-study and their interest in the country and people of the target language. In addition, the relationship between invested effort and final language proficiency is investigated. Data collection and analysis were based on a questionnaire with a total of 10 questions, which was prepared by the author herself in view of the objectives of the study.

The questionnaire contained open-ended questions, except for the question on self-assessment of the level according to the CEFR and a question on the evaluation of interest from 1-10. It was anonymous and was given to 26 students 3<sup>rd</sup> year students at the end of their undergraduate studies in the last session of the translation course.

## **Analysis and interpretation of findings**

The first question of the questionnaire was a self-assessment of language proficiency to find out how students evaluate their own abilities. Students were asked to assess their language level according to the CEFR from A1 to C2. Some students were not familiar with the Common European Framework of Reference for Languages, so the author had to explain which level corresponds to which language skills.

The result of the first question was that one out of 26 students assigned their language skills to level B1, two students assessed their skills to level B1/B2, 14 students assessed their skills to level B2, two students assessed their skills to level B2/C1, and six students assessed their skills to level C1 as shown in the diagram below. The answers to the first question show that students mostly consider themselves to be at the B2 level, followed by C1, and a few think they are at the B1 level. Two students were not quite sure if they were at a particular level, so they wrote B1/B2 or B2/C1. In summary, the students seem quite aware of their level of knowledge and assess it realistically.

In the chart, the undecided students who assessed their language proficiency between two levels, i.e. B1/B2 and B2/C1, were added to both categories:

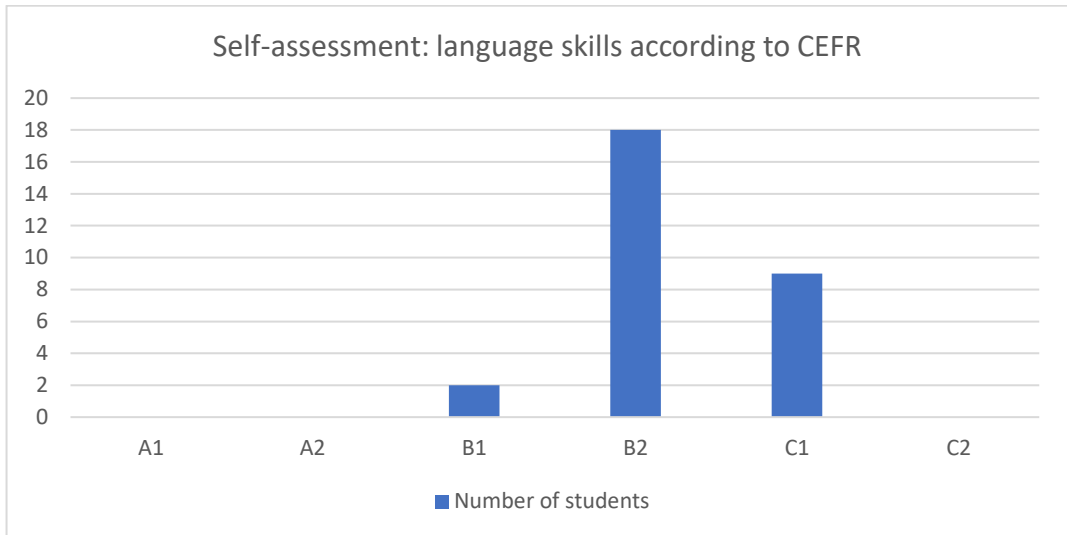


Chart 1: Self-assessment: language skills according to CEFR

The second question was divided into (a), (b), (c), and (d) because self-study was asked in specific areas: under a) they were asked how often they read books, magazines or newspapers that are not required within their German studies at the university, under b) how often they watch German movies, series or similar, under c) how often they have gone/go abroad (Germany, Austria, Switzerland) or have participated in a student exchange and under d) how often they talk to a native speaker (incl. chats on the Internet, personal communication, communication with tourists or similar).

The results were the following:

a) 11 students answered that they read rarely or too little, i.e. once in a while (newspapers or books), 3 students answered that they read German texts very often or often, 3 students read German texts at least once a week, 2 students answered that they never read German texts (neither books nor articles nor newspapers), 1 probably reads an hour a week (poems or articles), 1 student stated exactly that he/she reads a book within ten days and reads newspapers or articles a few times per week, 1 student stated that he/she reads two to three times a week, 1 student reads texts in German almost every day, 1 student wrote that he/she reads at least one text in German per day, 1 student answered that he/she sometimes reads some articles but always reads Wikipedia in German and 1 student answered that he/she reads 4-5 hours once a week.

According to the responses, students do not make much use of available written resources, as 11 students read books, magazines or newspapers rarely or not often enough, even though everything is available online nowadays, 2 students even stated that they never read anything in German other than required for class. The range

stated is from daily to sometimes. It is interesting to note that only one student reads German texts almost every day, all others do so only rarely, because reading once a week or a few times a month cannot be considered regular reading and intensive self-study.

b) 5 students watch German<sup>1</sup> series or videos on YouTube or TV daily or almost daily, 10 students watch German movies/series etc. sometimes or very rarely, 4 students watch them often or very often, 1 student watches 2-3 German movies a month, 1 student watches German movies or series once a week, 3 students watch them two-three times a month, 1 student watches them a few times a week, 1 student does not watch German movies or series at all.

Although media is almost inexhaustible nowadays and there are numerous providers like Netflix, YouTube, iptv etc. where you can watch movies, series, documentaries and everything your heart desires, only 5 students watch German series or videos almost every day, while 10 students watch them sometimes or very rarely. Again, one student does not watch German media at all and all others fall into the category of "once a week" or "a few times a month", which again cannot be considered regular exposure to German-language media and intensive self-study.

c) 1 student has been abroad ten times (concerts, trips or sporting events), but never as part of a student exchange, 3 students have been abroad once (day trip), 4 students have been abroad a few times (short trips), 3 students have been abroad twice, 8 students are abroad frequently (every year, once or twice a year), 3 students have never been abroad, 1 student has been abroad on a scholarship for one month, 1 student has been to Germany in secondary school as part of Erasmus (duration not specified), 2 students have been abroad 4 or 5 times.

One way to improve language skills is certainly to study abroad, whether through Erasmus or other scholarships, through a simple holiday abroad or a student job, because according to the *interaction hypothesis*, it is necessary to negotiate meaning, which is only possible when there is communication with an interlocutor. If the learner does not produce language, successful language acquisition cannot occur. For this reason, the university offers a wide range of scholarship programmes like Erasmus or others, and the Department of German also has collaborations, such as internships in Germany, but students rarely or never take advantage of these opportunities. As can be seen from the questionnaire, only one student has been abroad as part of Erasmus (in secondary school), 8 students are frequently abroad due to family connections, but most have rarely or never been abroad, which again indicates a lack of interest in traveling to the country of the target language and communicating with native speakers.

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<sup>1</sup> German here refers not only to German productions but also to dubbed productions from other countries.

d) Since Croatia is a tourist destination and many German-speaking tourists visit Croatia every year, various student jobs are offered, whether as waiters, animators, guides, work-placements in tourist offices, etc. As a result, there are opportunities to use the German language at home if one cannot or does not want to go abroad. Nevertheless, 16 students out of 26 state that they rarely or never communicate in German outside of the university, only 6 students state that they communicate frequently in German (especially during the tourist season), 4 students range from a few times a month to only when abroad, which is very rarely considering the previous question. Based on these results in the second question, students seem to lack general interest or motivation to take advantage of opportunities offered to them to improve their language skills outside the university in their home country or even within the university (e.g., scholarships).

The third question was aimed at the students' opinion whether they think it is necessary to learn by themselves during their German studies and to justify their opinion.

24 out of 26 students answered that it is necessary to learn by themselves during German studies. The reasons they gave varied: because lectures only give guidelines on what to learn, because languages are dynamic and constantly changing, because a language cannot be learned only at school or university, because one has to start thinking in the foreign language in order to understand the language better, because studies do not offer enough to expand vocabulary besides theory, because lectures are of no use if you do not consolidate the learning material at home, you have to expose yourself to the language constantly and as often as possible, because you know yourself where you can improve your knowledge, because additional exercises help us to improve our knowledge, only lectures in German are not enough to learn the language properly. 1 student thinks it is not necessary, but it would be good if they learn by himself and 1 student thinks that self-study is not necessary at all.

Considering the fact that there are different ways of self-study, as indicated in the second question, and the students obviously do not make much use of it, it is interesting to see that a large majority of them, 24 out of 26, answered the third question with the necessity of self-study during the study of German, and they also give good reasons for it, as mentioned above, which leaves open the question why they do not do it, although they consider it necessary?

As mentioned above, the author believes that motivation is one of the most important factors for learning a language, and it is also the driving force for self-study. The fourth question refers exactly to this: what motivates students to self-study? This was the question with the most nuanced responses. Almost every student had a different idea of what would likely motivate him/her to (continue) self-study:

3 students answered that they can only motivate themselves, 3 students answered that he/she does not know, 3 students answered that if learning materials were more



interesting and readily available, 5 students answered that a reward in form of a financial benefit, more free time, a study group or trips to German cities, would motivate them, 2 students answered that motivation would be if some courses required the acquisition of something not learned in the course, 2 students answered that living and working abroad would motivate him/her, 1 student answered that success at university and better communication with native German speakers, 1 student answered that less pressure at university, 1 student answered, that probably an interesting application for subjects he/she is interested in would motivate him/her, 1 student did not answer this question, 1 student answered that nothing could motivate him/her, 1 student answered that having German speaking friends outside the university would motivate him/her, 1 student answered that more free time and interesting topics would motivate him/her, 1 student answered that if they could learn all the things that interest them, e.g. watching movies, series etc. in German language, would motivate them:

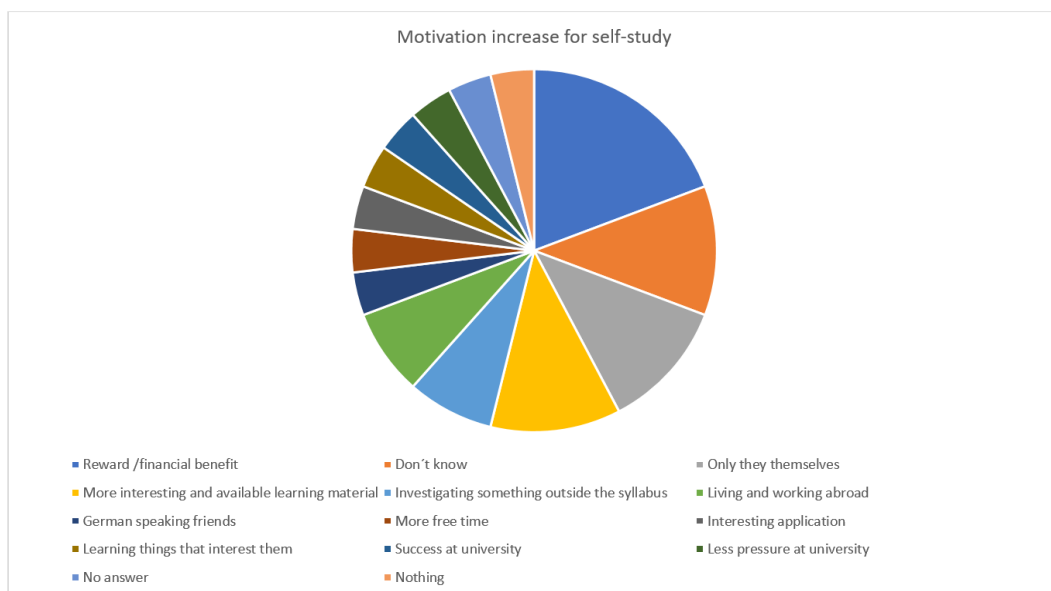


Chart 2: Motivation increase for self-study

An interesting finding is that the most frequently mentioned answer is a reward, either in the form of a financial benefit or in the form of travel or free time, followed by more interesting and available learning material, do not know, and that they can only motivated themselves. In the questionnaires, the financial advantage refers to working for money, i.e. take on jobs, i.e. translations that they would like to do during their studies and get paid for it. This is indeed an interesting point of view, because for translating and interpreting the language skills must be at a very high level, which they have not yet reached.

Since the second question was about how much they learn themselves in terms of watching German movies, series, etc., it is somewhat surprising that one student answered that "if they could learn everything they were interested in, e.g., watching movies, series, etc. in German." Obviously, the expectation here is that movies, series, etc. will be watched in classes at the university.

It is to be expected or suspected that someone who enrolls in language study is also interested in the country and its people. If the interest is there, then that in turn can be a motivation to look more closely at languages and regional studies outside of the courses at the university. The fifth question was designed to determine, on a scale of 1-10, how interested the students are in Germany and Germans (politics, economics, lifestyle, etc.).

For 7 students the interest in Germany on the scale of 1-10 is an 8, for 6 students a 7 and also for 6 students a 9. For 3 students the interest is a 6, for another 2 students a 5 and 1 student each indicated the interest with a 10 and a 4. As a conclusion it can be said that interest in Germany and the Germans varies on a scale of 1-10 between 4 and 10:

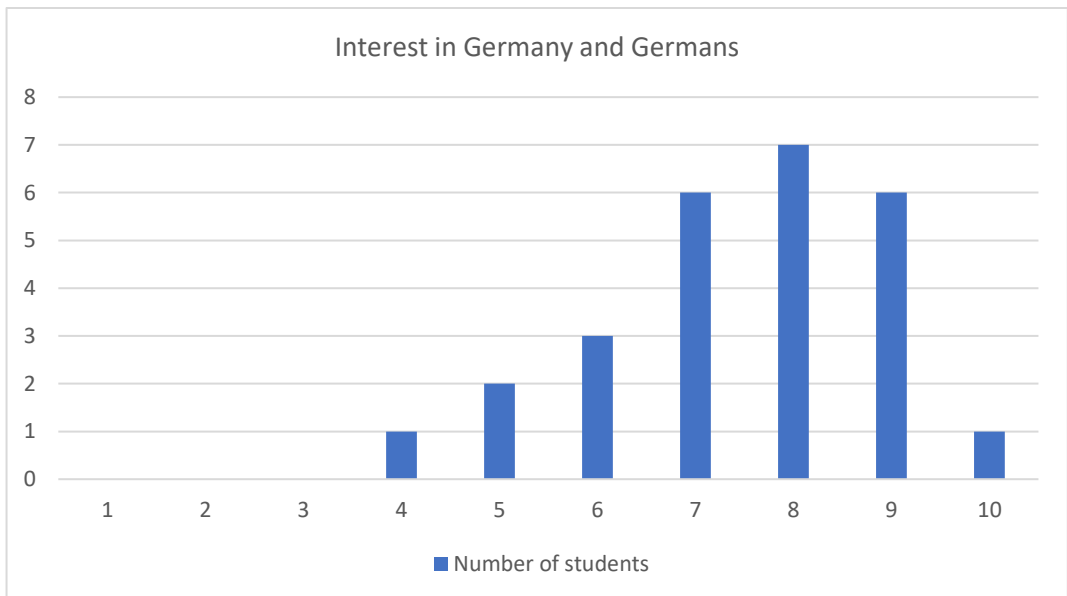


Chart 3: Interest in Germany and Germans

The sixth question aimed at how much the students know about Germany and its inhabitants (customs, way of life, mentality, etc.):

8 students answered that they know at least something about German customs, etc. know, 4 students think they know enough, 4 students answered that they know a lot through German studies, the Internet, TV and German YouTuber, 3 students answered that their knowledge is average, 2 students know a lot, 1 student thinks

he/she knows a lot and is happy to gain more knowledge every day, 1 student says he/she was born in Germany, has German relatives and learned a lot about the people through his/her work as a waiter during semester breaks, 1 student answered that he/she knows a lot because he/she watches documentaries and uses other media to get to know the culture better, 2 students did not answer the question correctly.

So this question mirrors the previous question: if there is a lack of interest in the land and its inhabitants, there cannot be much knowledge about them. Nevertheless, students say they know a lot, enough, or at least something about Germans and their customs, whether through their German studies, TV or YouTuber, or German relatives. It is interesting that even stereotypes about Germans were mentioned in the answers as knowledge about the country and its people.

The motive for taking up a course of study in German can provide information about how much motivation is to be expected from students. If someone enrolls in a course of study only because they do not know what else to do or because they have unrealistic expectations, it will be difficult to follow the classes and motivate themselves to work hard and make an effort, so the seventh question aimed to investigate which motives for taking up German studies are predominant among students.

7 students enrolled in German studies because they like the language and/or hope to improve their language skills, 7 students were good at German in secondary school and therefore enrolled in German studies, 4 students like the dynamics of the language and/or hope to get a better job if they speak the language, 1 student answered that it is the only language he/she knows besides English, 1 student enrolled in German studies as he/she has relatives in Germany/Austria and likes the culture, 1 student thinks that German is the most useful language in Europe next to English and French since Croatia joined the EU, 2 students have studied German for a long time and like the language/literature, 1 student feels connected to the language because he/she watched the German TV for many years, 1 student said he/she has no motive but only an impulse because he/she was good at German in secondary school and it would probably look good in his/her resume, 1 student calls Germany his/her second home and loves the country, the people and the language.

It is encouraging that more than half of the students chose the program because they like the language and want to expand their language skills, like the country and the people. Other motives that come up are better job opportunities if you know German and the opinion that German is one of the most important official languages in the EU so it would be good to speak it. One answer was somewhat provocative or inappropriate, because one should not study a language because it might look good on a resume.

As mentioned earlier, expectations and their fulfilment can also play a role in motivating students to study and self-study. If students have unrealistic or completely

different expectations before enrolling in a course of study, it is difficult to manage the workload and put in extra effort to achieve good results and learn something that was probably not expected, so the eighth question was aimed at what students expected from studying German before enrolling.

8 students expected an improvement in language skills, 2 students expected exactly the courses offered in German studies, 2 students expected many grammar and literature courses, 1 student expected much more creativity in literature, 1 student expected to learn more about German language, culture and literature, 1 student expected interesting topics, much communication, travel to Germany, many professors who are native speakers, 1 student expected much more, i.e. less learning because less is remembered when there is a lot to learn, 1 student expected more communication and writing, less reading, 1 student expected to learn more about culture and literature, 1 student expected a lot of work and active communication, 1 student expected many translations and less work, 1 student expected at least one field trip to a German speaking country, 1 student expected what he/she has seen in movies, 1 student did not know what to expect, 1 student expected professors to be more interested in their lectures, 1 student expected it to be difficult and challenging, 1 student did not answer the question.

In general, the majority of students expected to improve their language skills, but in the area of vocabulary and communication, grammar was the most criticised for being difficult and unnecessary. Comparing this to the career aspirations in the last question, how do they expect to work as a teacher or translator if they do not know German grammar at a high level?

The ninth question aimed to find out if students' expectations were met and what was different than expected.

8 students answered that their expectations were partially met, 8 students answered that they were satisfied with the study programme and it met their expectations, 3 students expected to learn more about German culture by travelling to German speaking countries as part of the study programme, 2 students expected more vocabulary work and/or felt that more grammar exercises were covered, 2 students felt that too much study material was covered, 2 students on the other hand felt that not enough was covered in depth, 1 student simply answered "no". Regarding the fulfilment of their expectations, more than half of the students indicated that their expectations were met or somewhat met.

The last question aimed to find out if students know what they want to do professionally after graduating from German studies. As mentioned earlier, the Faculty of Humanities and Social Sciences at the University of Rijeka offers a general undergraduate programme and two postgraduate programmes (teacher training and translation studies) in languages. Students can work in tourism, broadcasting,

newspapers, offices, etc. after completing their undergraduate studies, but they can also continue their studies to become teachers or translators.

The evaluation of the questionnaire showed that 8 students want to become teachers of German, 5 students want to become translators/interpreters, 5 students do not know yet what they want to do professionally, 4 students want to combine teaching and translating, 2 students want to combine teaching and a job in tourism (e.g. tourist guide), 1 student wants to do something not related to the German language, 1 student wants to work at a helpdesk where German language is required.

As a result, it can be stated that most students want to become teachers or translators, or they aspire to a combination of both, or they want to become teachers and work in tourism. It is interesting to note that five students do not know what they want to do professionally at the end of their studies. One student obviously chose the wrong course of study because he/she does not want anything to do with his/her field, i.e. the German language, while another might have taken a language course because he/she wants to work at a help desk and look after German-speaking customers:

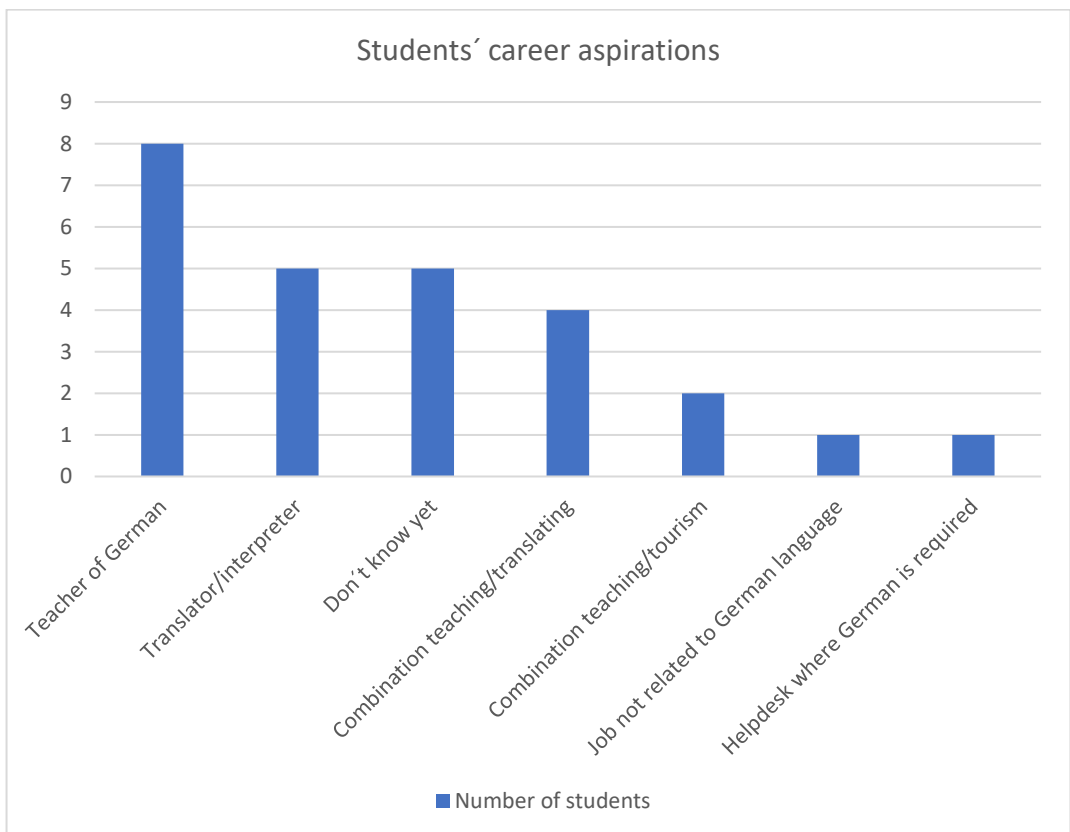


Chart 4: Students' career aspirations

In a final step, the answers were compared with the language level to which the students had assigned themselves. Most of the students who assigned themselves to language level C1 are frequent self-learners, read German texts, watch German movies, series, etc., and have visited a German-speaking country, some even for a longer period of time, except for three students who have never been abroad. They are also the ones who are more interested in German people and culture and find it necessary to do a lot of self-study.

The students who assigned themselves to C1 level are also the ones who see working for money as motivation for (continued) self-study. Presumably, they have more confidence in the language and think that their language skills are good enough to place them already on the market. Interestingly, the expectations of this group of students were only partially met and they were able to name which expectations were not met and what should be improved.

The students who assigned their language skills to B1 or B2 level mostly do not self-study a lot, do not read German texts or watch German movies, series etc. They also have not been to German speaking countries, except for three students who stated that they have been abroad (short trips, one student exchange).

## Conclusion

It can be concluded that students' motivation for self-study or study at all is related to their language skills, expectations, and fulfilment of expectations from the university. In addition, the motivations for enrolling in the programme are crucial. If a student has the impression that studying German is just a language course, the demands and tasks at the university will seem unfulfilling and difficult to master. As the analysis and interpretation of findings show, most students have rated their language level at B2 or C1 at the end of the undergraduate programme. In the degree programme, language proficiency at the C1 level according to the CEFR is required after completion of the undergraduate degree. Only half of the students consider themselves to be at this level.

On the one hand, almost all of them answered that self-study is very important during their studies, but when asked if they learn by themselves, e.g., by reading or watching TV in German, staying abroad etc. most of them gave a negative answer, i.e., they do not perform these activities often enough. According to Sheela and Rakumar (2016), these are exactly the activities that are fun and should be practised in foreign language learning (here EFL):

*"Watching sitcoms in English, reading magazines and surfing the Net are considered fun by many teachers and students and not perceived as activities that can do good to students' language proficiency. Yet these resources can considerably increase learners' general and cultural awareness and should be interwoven into studying routines, because background knowledge is a tremendous facilitator of comprehension."* (Sheela, Rakumar, p. 4463)

This allows students to improve their knowledge of the country and its people as well as their language skills. Since the syllabus at the university is very extensive and includes many subfields in which insights into theoretical background are also taught, such activities can only take place in the form of extracurricular events, such as movie nights, but it is certainly a good and entertaining way to practise at home.

The students themselves are not quite sure what would motivate them to (continue) self-study. Some feel overwhelmed with the subject matter in the course and do not have time for self-study, others do not think it is necessary, while some of them have recognised the need and do a great deal of self-study. As mentioned before, German studies students are not homogeneous, as they start with different language skills and different expectations, but on the other hand, no class is homogeneous either. There are always students who learn quickly, while others need more time to complete their assignments. But whatever their starting point:

*“Interest and motivation are essential factors when it comes to language learning, but one should distinguish between reward and work when bringing different types of media in the classroom. Learners recognize when they are being taught when they are at school, and they may concentrate on what the teacher is presenting. But when they sit on their computers at home, watching a film or playing a game, they might learn words and phrases and use them in real life situations.” (Yin, p. 153)*

According to the students' responses, they expect the university and professors to organise field trips and watch movies and series in German with them in class. Although, there are many offers for scholarships and stays abroad within the framework of Erasmus or other organisations, very few students accept these offers.

Nearly half of them lack the motivation for study and self-study and don't exactly know what would motivate them, while the other half sees the need and does extra work for their own good, what is evident in their self-assessment of language skills.<sup>1</sup>

In general, it seems that students who rate their language skills at a higher level are more motivated to study and self-study, have more realistic expectations of German studies, and are more interested in the country and its people, travel abroad, and report having more knowledge of the culture of the country whose language they are studying. There is also a relationship between the motive for enrolling in the study programme and the motivation for studying. Students who love the language and want to improve their language skills do more extra work and rate themselves at a higher language level. The lack of motivation is probably due to the fact that there is no inner need (intrinsic motivation) to learn L2 as there is in learning L1. Intrinsic and extrinsic motivation could be examined more closely in another study, as some students reported extrinsic motivation, such as rewards or financial benefits, as a

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<sup>1</sup> The students' self-assessment cannot be compared to the teacher's assessment because the questionnaires are anonymous. It could be that some students overestimated themselves while others underestimated themselves.

factor in their motivation. It would also be interesting to further investigate language proficiency in the native language to compare whether there is a relationship between proficiency in L1 and L2/L3, as some authors of language acquisition models (e.g., Chomsky, Cummins) claim.

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## Charts

- [1] Chart 1: Self-assessment: language skills according to CEFR
- [2] Chart 2: Motivation increase for self-study
- [3] Chart 3: Interest in Germany and Germans
- [4] Chart 4: Students' career aspirations

# Exploring Chinese college students' awareness of information security in the COVID-19 era

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## Abstract

The focus of this research was to look into the information security awareness of Chinese university students during the COVID-19 pandemic and make recommendations based on the survey's findings and research literature. The quantitative method is applied in this study. 111 Chinese college students were randomly sampled and requested to answer a Likert information security awareness questionnaire. The descriptive analysis of the data in this study is also done with SPSS. The findings revealed that the vast majority of college students know the significance of information security awareness and have basic information security awareness, based on the data collected. However, some students have not participated in relevant training courses, and many college students do not pay enough attention to personal information security, resulting in poor performance in areas such as files and passwords. As a result, effective solutions such as information security training projects are required to address the current deficiencies. The findings of this study have implications for university administrators and policymakers in terms of how to raise students' awareness of the security of their online learning information. The study should use mixed methods and large sample sizes in the future to provide more detailed and comprehensive survey data, and more credible evidence of college students' information security awareness.

**Keywords:** Information security awareness; College students; Information security

## 1. Introduction

On March 11, 2020, the Director-General of the World Health Organization (WHO) declared COVID-19 a global pandemic. The spread of covid-19 has put pressure on all sectors of society, for example, the use of telemedicine has greatly increased as the pressure on traditional medicine has increased (HealthCare & Somerville). Similarly, in education, the covid-19 pandemic affects more than 91% of students worldwide (Henaku, 2020). As a result, many schools and universities around the

world have adopted online learning and use many online learning platforms and online communication software(Crawford et al., 2020).

Although many schools are transitioning from face-to-face to online learning promptly, various schools are actively using online communication and learning platforms, and the education system is striving to provide quality education to students, however, online teaching is a completely different teaching experience for many teachers and students compared to traditional teaching methods, and different populations have different adaptations to online learning(Pokhrel & Chhetri, 2021). As a result, more and more problems are identified in the process of online learning (Dumford & Miller, 2018). Specifically, many students' academic performance decreases due to the lack of consultation with teachers(Subedi et al., 2020). There are also many developing countries where students have difficulty affording the equipment to study online, for example, in Colombia, only 34% of students have access to computers for online learning at home(Henaku, 2020). Less than 50% of households in rural areas of Georgia have access to computers(Subedi et al., 2020). Another issue that should not be overlooked is the exposure of the online learning environment to ongoing Internet security threats, which may involve risks such as the destruction of educational assets or unauthorized changes to the information(Chen & He, 2013).

Graf (2002) mentioned that the security of student information in online learning is frequently at risk, such as the loss and exposure of critical information. Online learning programs usually employ security protection mechanisms, yet problems such as manipulation and theft of information by outsiders still occur at times(Graf, 2002). Some researchers have explained the information security threats of online learning from the user perspective and the management perspective, where reckless human behavior is one of the main causes of information security threats in online learning(Chen & He, 2013). For example, when interacting with one another, college students frequently unintentionally exchange personal information that should be protected, and they share student ID numbers and passwords with their friends on social media, demonstrating a lack of awareness of personal information security that may stem from a "childish" student culture(Allen, 2011). Because students are generally nomadic and have less credit history than more mature individuals, college students are regarded to be a group at more risk for information security(Marks, 2007).

The main reason for e-learning security problems involves users not knowing the rules of information security very well, which results in wrong security behaviors and at the same time lack of appropriate guidance(Chen & He, 2013). Moreover, research has revealed that human mistake is regarded as one of the most serious concealed dangers to the security of information assets in businesses(Whitman & Mattord, 2021). The cost of user misbehavior can be higher than the cost of building a security system (Gómez Cárdenas & Sánchez, 2005). Therefore students must consider the

security of their personal information and raise awareness of information security when conducting online learning (Chen & He, 2013). Developing an IT security awareness program is critical to ensuring the security of student, faculty, and academic data (Ellison, 2007).

As a result, the goal of this study is to assess college students' present degree of information security awareness. Also, make recommendations on how to improve college students' information security awareness in order to serve as a reference for the construction of college information security programs.

## **2.0 Literature review**

### **2.1 Information Security**

Information security is defined by McDaniel and McDaniel (1994) as concepts, skills, technological solutions, and administrative measures used to prevent unauthorized access, destruction, exposure, manipulation, modification, and loss of information assets. Software, hardware, data, users, processes, and networks are the six elements of information systems; however, users and processes are sometimes overlooked when it comes to information security (Dlamini et al., 2009; Maconachy et al., 2001).

Information security is defined as the capacity of authorized users to access learning resources without being compromised in online learning (Adams & Blanford, 2003). Confidentiality, integrity, and availability are the three essential prerequisites for security (Weippl & Ebner, 2008). Confidentiality refers to the fact that information is not accessible to unauthorized individuals and is not vulnerable to an unlawful disclosure; Integrity refers to the fact that information is accurate and complete and is not subject to unauthorized manipulation or destruction. Availability refers to the ability for already authorized users to access and use information whenever they need it, guaranteeing that it is available.

Many academics have been concerned about information security as the Internet has grown (Höne & Eloff, 2002). In the sphere of education, information security is one of the most significant aspects of education digitization, which necessitates extensive preparation and investment. Due to the stability and public welfare of the education industry, the leakage of its data does not lead to direct economic loss by losing a large number of customers like financial and other industries, but precisely because of the low cost of data leakage of individuals in the education industry, to a certain extent, it will weaken the importance of schools to the information security of online education and may further trigger a crisis of public trust in the information security of online education.

### **2.2 Information security awareness in the context of education**

Information security awareness is defined as the user's realization of the importance of information security (Siponen, 2000) It mainly changes the security behavior of individuals (Taha & Dahabiyeh, 2021). With the increasingly digital educational

environment and the widespread use of online courses during the covid-19 period, it has become particularly important to create a safe and secure online learning environment(Taha & Dahabiyeh, 2021).

Several previous researchers have highlighted the importance of information security awareness(Hadlington et al., 2021; Wiley et al., 2020). Some studies have focused on the information security challenges faced by online learning, including malware attacks, unauthorized access to learning content, etc(Kambourakis, 2013; Shonola & Joy, 2014). Furthermore, the usage of cloud computing services (for example, Google Drive) in education creates information security vulnerabilities because educational institutions have no control over these cloud computing service platforms(Kambourakis, 2013). And schools also have no security control over the personal devices used by students in the learning process (Monrad, 2019). In other words, in the process of online learning, educational institutions are faced with many information security risks that they cannot control. In addition, nowadays, there are many students and teachers who use social media sites (e.g., Facebook, Twitter, etc.) to support teacher-student collaboration in online courses, etc.(He, 2011), however, many teachers and students are careless, so these sites are a major source of information security risks, and personal data posted on social media may be misused(Patel et al., 2012).

Therefore, many scholars have further studied the security awareness of users in educational institutions so that users can reduce the occurrence of insecure times such as information leakage in terms of their own use(Gharieb, 2021). Specifically, Kim (2014) suggests the need for universities to provide information security awareness training to students. a study by Yoon et al. (2012) also shows that both security awareness education and awareness of the seriousness of information security issues have an impact on students' information security awareness. Therefore, schools need to strengthen information security education for students and develop good security habits (Yoon et al., 2012), however, early studies found that only a few universities give information security awareness training to students (North et al., 2006).

With advances in technology and concepts, many developed countries, including the United States, are making efforts to strengthen public awareness of information security and are urging university leaders to take appropriate measures to protect the university's information network (Roach, 2001). For example, in 2014, California enacted the "Eraser Law" - the Student Online Personal Information Protection Act - which classifies content generated by students on social media, online services, and mobile software as personal data privacy, and online service operators are required to remove information posted on web pages by minors within a specified time frame(Wang, 2016). This statute was later borrowed by several U.S. states as a reference for legislation on educational information security (Molnar & Boninger, 2015). In addition, the EU adopted the General Data Protection Regulation in 2016,

which has had a global impact and can be applied to institutions that process student data as well as third-party service providers to provide clear regulation of their data operations, organizations are required to collect and use personal data lawfully and to provide appropriate privacy protections. (Steiner et al., 2015). However, studies have shown that the development of information security awareness may face more obstacles in developing countries, and the lack of socio-cultural environment and resources, and knowledge may create a gap between the development of this area and developed countries(Rezgui & Marks, 2008). Therefore more feasible measures are needed to narrow these gaps.

Siponen (2000) mentioned that despite the general recognition of information security awareness, there are fewer studies with depth, probably because of the momentary non-technical nature of information security awareness. Thus the number of studies considering information security awareness is currently relatively limited, especially in higher education settings(Rezgui & Marks, 2008). Overall, scholars have proposed various information security risks, and solutions to mitigate online learning risks, but there is currently a lack of attention and research on increasing students' information security awareness.

### **3.0 Research method**

#### **3.1 Research Design**

The purpose of this study was to explore college students' awareness of information security during their online learning process during the New Crown. A quantitative research method was selected for this study. This is because its purpose is to ask narrow objective questions and generate quantitative data that can be analyzed using statistics (Weippl & Ebner, 2008).

#### **3.2 Participants**

The study used a quantitative method. Students' security information awareness was considered as a variable that could be measured by a questionnaire. A convenience sampling technique was used in this study and 111 students from different universities in different regions of China participated in this questionnaire. The researcher used an online questionnaire to conduct the survey and it was conducted in March 2022. In terms of ethical considerations, an information sheet was added before completing the questionnaire to clarify the main purpose of the survey and to seek students' consent to participate in the study. It was also emphasized that participation was completely voluntary and anonymous and that withdrawal from the study was possible at any time.

### 3.3 Research Instruments and Procedures

In this study, a questionnaire was distributed to investigate the information security awareness of college students. A questionnaire consisted of two parts, the first part was demographic information including the age and gender of the participants and whether they had attended security awareness training, and the second part was questions related to the participants' information security awareness. The questionnaire in this study was designed using the questionnaire established in the study of Kim (2014). These 17 items were tested on students using a Likert scale, and a Likert-type 5-point scale ranging from strongly disagree (1) to strongly agree (5) was supplied as answer possibilities for all items, with just one response allowed for each item. Data were collected and then analyzed using descriptive statistics. In this study, 17 items were selected for a questionnaire survey based on previous scholars' studies (Kim, 2014), including :

- Require the usage of an anti-virus program;
- Require the frequent upgrading of virus definitions;
- Require the regular scanning of a computer and storage media;
- Require the use of a personal firewall;
- Require the installation of software patches;
- Require the use of pop-up blockers;
- Be aware of the risks of downloading files or programs.
- Recognize the dangers of peer-to-peer (P2P) file-sharing;
- Recognize the dangers of clicking on links in e-mails;
- Be aware of the dangers of e-mailing passwords;
- Be aware of the dangers of e-mail attachments;
- Back up vital files regularly;
- Be aware of the dangers of smartphone viruses;
- The requirement for a smartphone anti-virus application;
- Understand the features of a strong password;
- Use various passwords for various systems;
- Change your passwords on a frequent basis.

### 3.4 Reliability and validity of the study

Reliability describes the precision of the measurement, and reliability will be assessed by the Cronbach alpha coefficient, and the reliability result of the questionnaire used in this study was 0.859, so the questionnaire has high reliability and is suitable for distribution to respondents (Cronbach, 1957).

The validity was further evaluated, and the KMO and Bartlett coefficient tests of the sample data using factor analysis in SPSS 26.0 in this study showed a result of 0.796, which to some extent indicates the high validity of the measurement model.

### 3.5 Data analysis

The data was analyzed using SPSS version 26 to produce a descriptive analysis of the results, including mean and standard deviation scores, to determine the level of students' information security awareness.

The information concentration of the 17 question items was explored first using factor analysis, and the SPSS output revealed that the KMO value was 0.796, which was more than 0.6, satisfying the prerequisite requirements for factor analysis and implying that the data could be used for factor analysis study. The data also passed the Bartlett sphericity test ( $p < 0.05$ ), indicating that it was suitable for factor analysis (As illustrated in the table).

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KMO and Bartlett's Test			
Kaiser-Meyer-Olkin			.796
Measure of Sampling Adequacy			
Bartlett's Sphericity	Test of Approx. Chi-Square		763.111
	df		136
	Sig.		.000

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Fig. 1. KOM and Bartlett's test

In this study, factor analysis was used to obtain five factors (factor loading coefficients  $> 0.4$ ) based on the criterion of eigenvalue one, and only those factors with eigenvalues greater than one were considered significant.

The first five components can explain 67.3 percent of the variation with eigenvalues greater than one, according to the findings. A single factor accounts for 16.46% of the variance, a second factor for 13.95% of the variance, a third factor for 13.64% of the variance, and the fourth factor for 12.71% of the variance, and the fifth factor for 10.54% of the variance. To identify the relationship between the factors and the study items, the final data of this study was rotated using the varimax approach. The correspondence between the factors and the study items was then assessed after confirming that the factors could extract the majority of the information content of the study items. By correlating the five factors with the question items, the five factors were named; factor one was email and mobile security, factor two was information system security awareness, factor three was the security of files and passwords, and factor four was cyberattacks, and factor five was browser security. These five aspects represent the current security awareness issues of the respondents.



#### 4.0 Results and Discussion

This section provides the results of the study, which focuses on the analysis of the questionnaires collected from the online survey through descriptive statistics. The first part of the questionnaire consisted of demographic information and questions about whether or not they had attended an information security awareness course.

In terms of the gender of demographic information, 81 (73%) of the participants were female and 30 (27%) were male (As shown in Fig. 2). In terms of grade composition, 9 (8%) were first-year students, 25 (23%) were sophomores, 20 (18%) were juniors, 43 (39%) were seniors, and 13 (12%) graduate students, and 1 (0.9%) doctoral student participated in this questionnaire(As shown in Fig. 3).

	Frequency	Percent(%)
Female	81	73
Male	30	27
Total	111	100

Fig. 2. Gender

	Frequency	Percent(%)
Postgraduate	13	11.7
Fourth-year	43	38.7
Third-year	20	18
Second-year	25	22.5
First-year	9	8.1
Doctor	1	0.9
Total	111	100

Fig. 3. Grade Level

First of all, students were surveyed whether they had attended courses and training related to information security awareness (as shown in the table), and 80 (72%) respondents indicated that they had attended related courses, so it can be found that most college students are educated about information security awareness.

	Frequency	Percent(%)
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Never attended	31	27.9
Attended	80	72.1
Total	111	100

Fig. 4. Attended or never attended

Furthermore, Figure 5 shows the means and standard deviations of the five dimensions of college students' information security awareness, and the data shows that students have a high level of awareness in terms of information system security perceptions but a poor level of security awareness in terms of files and passwords.

Dimensions	Mean	Std. Deviation
Information System Security Awareness	4.4204	0.63199
Email and Mobile Security	3.8198	0.75692
Browser Security	3.7568	1.07209
Cyber Attack	3.7538	0.87005
File and Password Security	3.3183	0.70157
Total	3.7334	.54301

Fig. 5. Mean and Std. deviation

Overall the level of information security awareness among college students is relatively high (M=3.73). Specifically, in the aspect of information system security awareness, the vast majority of students agreed that schools should install relevant information security procedures and the importance of information security knowledge, and the mean score of this dimension was 4.42, which was considered to be the highest mean score, indicating that students' information security awareness in this area is high.

The second dimension is email and mobile security, and the results of the study found that most students are already aware of the information risks of email and the virus risks of mobile devices. Also the average score for this dimension was 3.82, which is also a relatively high score, indicating that students are more aware of information security in this area. However, the score of one of the questions about the risk of email attachments was low, with only 66 (59%) students recognizing the information risk

of email attachments, indicating that many students are still very unfamiliar with the risk of email attachments.

The mean scores for cyber attacks and browser security are relatively close, at 3.75 and 3.76 respectively. However, some students did not seem to have a good understanding of some of these information security items. For example, out of 111 respondents, only about 61 would install software patches, 65 would use a personal firewall and 66 would use a pop-up blocker. This means that nearly half of the respondents are not aware of these items and they do not take effective actions to protect their personal information, which may bring many threats to information security. In addition, in the dimension of cyber attack, the question about checking and scanning electronic devices at regular intervals scored better, with only 7% of people having no relevant awareness. This may be because security software has developed better in recent years and it has become more convenient for users to check the security of their devices. According to the 2013 China Internet User Information Security Report released by the China Internet Network Information Center (CNNIC), 96.5% of users have installed security software on their computers and 70% of users have downloaded security software on their cell phones. This brings convenient conditions for checking and scanning electronic devices.

The lowest scoring dimensions were file and password security. One of the lowest scoring items was changing passwords for each software regularly, with only 24 people (21%) changing their passwords regularly. Students are also unaware of the dangers of P2P file sharing, with only 36 (32%) saying they are more aware of the risks of file sharing. Also just under half (44%) of respondents said they use different passwords for different software. In the file backup item, 33 (30%) individuals said they do not regularly back up their files. Knowledge of strong passwords and awareness of file downloading risks, which are also in this dimension, performed slightly better, with only 15% and 11% of people not having relevant security awareness, respectively.

In general, students are aware of general security threats and protection procedures. Nevertheless, they do not make sufficient efforts to protect their devices or information and do not follow good information security practices.

## 5.0 Recommendations

Although students score well in the awareness of information security system, there is still a certain percentage of students who lack the relevant awareness that cannot be ignored, and schools and relevant education policymakers should increase the dissemination of relevant knowledge. At the same time, information awareness education activities should be carried out to make students fully aware of the necessity of information security systems, and relevant knowledge should be updated and publicized at all times.

In the second place, the university should provide relevant information security awareness training to college students, and previous literature has suggested two ways to improve information security, including a sanctions-based approach and information security awareness training (Siponen et al., 2007). This study is concerned with information security awareness training (Siponen, 2000). The purpose of information security awareness training is to encourage and stimulate users to consider information security and the significance of information security measures (Gardner, 2006). In addition, lack of training is regarded as the leading cause of inadequate reaction plans (Coopers, 2013). If college students are not familiar with the school's information security policies and rules, they will not be aware of the potential information risks in the school and correctly maintain personal information security (Kim, 2014). Because problems might occur as a result of a lack of personal knowledge, abilities, and attitudes, training becomes an effective type of intervention (King et al., 2001). Planning, organizing, implementing, reviewing, and following up are the four processes of effective training (Vincent & Ross, 2001). In response to the current situation that students do not have a comprehensive understanding of e-mail risks, it is suggested that each university can carry out relevant thematic training, targeted training, and assessment of college students' general knowledge of e-mail information security, etc., to ensure that students can use online communication platforms such as e-mail under the premise of ensuring their own personal information security.

Furthermore, an effective security awareness campaign should concentrate on how users develop long-term security practices (Okenyi & Owens, 2007). What can be found from the survey is that respondents generally scored low on personal information security behaviors, such as using software patches, using personal firewalls, and pop-up blockers. This indicates that even though students have some awareness of security procedures, they still do not have enough security behaviors in their personal practices. Schools or education authorities should provide targeted training and teaching on the means of personal information protection to ensure that students are able to defend themselves against cyber attacks. Overall, security awareness efforts aim to change behaviors and reinforce good practices among students; awareness does not practice, and the purpose of strengthening information security awareness is simply to focus attention on security, while the skills students acquire during training are based on awareness (Wilson & Hash, 2003). Only by improving students' information security awareness through training can their information security behavior be further promoted.

The worst performing areas of file sharing and passwords need to be given sufficient attention. Few students pay much attention to the security of private passwords, often using one password for a long time and using the same password for multiple platforms at the same time, and without sufficient awareness of file downloading and sharing. This may be due to the popularity of social software, where it has become easy for students to share their information online, yet this may introduce some

computer viruses as well as violate copyright laws because the content shared is not in the public domain (Kim, 2014). To address these specific issues, schools should regularly measure students' security awareness levels to provide targeted training to provide students with the training content they need.

Since it is still during the covid-19 pandemic, information security awareness training does not need to use traditional face-to-face courses at all; virtual training (online courses or video-recorded training) can be used to allow students to attend the training more easily and to control training costs for both the organizers and the students. This is because budget constraints are also a significant barrier to information security awareness programs (Chen, 2009).

Schools should also encourage college students to read books, publications and other materials about network information security through school libraries, mobile phone electronic reading rooms, etc., or arrange online courses on related contents, etc., or provide relevant elective courses, so as to broaden the channels for college students to obtain knowledge about network information security.

In addition, schools need to take effective measures to truly engage students in training, such as making virtual training in information security awareness a graduation requirement, automatically alerting students to personal information security tips when they log into learning platforms or school programs, or holding regular webinars to promote information security knowledge. In addition, information security awareness training programs need to be updated as technology evolves and new security threats emerge so as to maximize the protection of teachers' and students' personal information.

## **6.0 Conclusion**

It is a necessity that online instruction requires students to have a high level of information security awareness. The results of this study showed the level of information security awareness among Chinese college students. The analysis revealed that students generally have some awareness of information security and can take some basic precautions, but their personal practices are not sufficient, with a significant lack of security awareness in file sharing and password security, and a lack of personal awareness of the risks of cyberattacks.

In consideration of these findings, higher education institutions should provide targeted information security awareness to students, such as conducting information security training programs, updating relevant precautionary knowledge, and setting security tips on school websites, in order to help students improve their own information security awareness and prevent threats to their personal information.

However, there are limitations to this study. Firstly, this study was limited to the students' perspective, so future studies should also consider the teachers' and principals' perspectives. Secondly, the current study was limited to a quantitative

study with data from a random sample of 111 college students. Therefore future research could involve a larger sample size to ensure the presentability and generalizability of the data. In addition, interviews are needed to further explore and explain the possible reasons for these findings.

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# Perception, Engagement and Satisfaction of English Language Learners with Online Learning During Covid-19 Pandemic

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## Abstract

Schools around the world have always been striving to modernize and digitalize the educational process. This is especially true for English language classes where English teachers tend to incorporate online assignments, activities, and games, depending on the topic of the lesson. However, many would still rely heavily on traditional teaching methods and paper based tests and feedback. Covid-19 pandemic enforced the digitalization process practically overnight, forcing learners and educators to utilize exclusively online learning platforms and tools as studying in person was impossible. Learners around the world had to adjust to new learning conditions and learn in a way that is different from what they were used to. Thus, this paper attempts to provide a general insight into the perception of students in two international schools towards this transition to online learning, their participation and engagement, as well as satisfaction with the learning outcomes in English language.

**Keywords:** Online learning, Covid-19 pandemic, students, language learning

## 1. Introduction

The worldwide closure of schools as a result of the Covid-19 pandemic transformed the ways in which students learned and teachers taught so far. This, as stated by Trincherro (2020), forced introduction of distance learning, came unexpectedly and left little or no time for preparation.

According to Biner et al. (1994), virtual online or distance teaching implies that teachers and students are not physically present at the same place, at the same

time in a classroom, but the materials and learning contents are shared and lessons are delivered to the students through digital tools and platforms such as audio files, videos, Internet, and telephonic communication, chats, etc. Therefore, as a result of the largest disruption of education systems in human history (Pokhrel and Chhetri, 2021), many of the main participants in the educational process found themselves being engaged in online learning fully for the first time in their lives.

The changes that happened so suddenly, in normal conditions, would require resources, training, planned strategy, and adaptation of the participants in the process. As this was impossible to implement, the disruption caused students and teachers to cope with the situation to the best of their abilities. This undeniably implies that students as well as teachers all around the world faced different challenges and obstacles on the way.

Therefore, this study aims to give its own contribution to better understanding of how this sudden shift from in-person to fully online learning was perceived by the students, how much effort and engagement was invested when it comes to participation in online activities, and if the learning outcomes improved or worsened in the first year of in person learning after the disruption. We hope we will be able to identify the challenges and offer solutions for their overcoming in the future.

The inventory for the participants consisted of open-end questions that aimed to gain a broader insight into the challenges students faced as well as segments of online learning they liked. Other items were mainly Likert scale statements aiming to assess the enjoyment, engagement and participation in online classes as well as satisfaction with performance and outcomes.

The research sample consists of students at international middle and high schools in two countries - Bosnia and Herzegovina and Qatar. The aim of this research is to capture students' experiences and opinions they formed about online learning during Covid-19 pandemic which should reveal certain shortcomings in the process that we seek to improve in the future.

## **2. Research questions**

Findings of the previous studies on the topic created the need for further research on the perception of online learning. Thus the objectives of this study are: (a) investigating the perception and attitude towards the online learning; (b) participation and engagement in online lessons; and (c) satisfaction with the learning outcomes and their comparison with the outcomes achieved in the first year of in-person learning after the closures.

Apart from aiming to contribute to better understanding of students' views on the process of online learning in hindsight, this study also aims to generate new ideas and solutions focusing on improvement of online learning for future use.

With this intention the study raises the following three research questions:

What is the perception of students towards online learning during Covid-19 pandemic?

How much were students engaged in the educational process during online learning?

Are students satisfied with online learning outcomes last year and are there any differences between this year and last year's final grades in ELA?

### **3. Literature review**

According to a number of authors (Driessen et al., 2020; Bergdahl & Nouri, 2021; Pokhrel & Chhetri, 2021), the 2020 pandemic closure led to the creation of an alternative learning environment based mainly on distance learning methods and forms using modern digital technologies. Thus, schools, regardless of using blended or fully online learning, faced certain limitations in terms of pedagogical activities which placed, according to Bhamani, et al. (2020),

the burden of education mostly on students.

This “forced” closure of schools and implementation of online learning has obviously generated inescapable changes both in curriculum content delivery as well as in structure of the lessons.

The teaching and learning strategies for an online classroom are deviant from a traditional classroom as the physical absence of teachers and students, their expressions, gestures, and tones have reduced interaction and communication between teachers and students in a classroom (Ko & Rossen, 2017).

The implementation of online learning was on a scale never seen before (Czerniewicz, 2020). Obviously, this created new challenges for everyone involved in the educational process. Challenges include dealing with technical problems related to technology, designing appropriate activities, relating pedagogies with technology, and gaining learners' support (Son, 2018).

Lederman (2020b) pointed out that lack of reliable Internet, a dedicated workspace, or adequate technology particularly impacted participation in

synchronous meetings, such as those held over web-conferencing software like Zoom.

When discussing students' attitudes towards learning using technology, Al-Mekhlafi (2020) reported that students held a favorable attitude. Additionally, in Moorhouse's (2020) study in Hong Kong, it was found that the participants preferred the blend between synchronous and asynchronous modes of online learning when a face-to-face meeting was not possible due to the Covid-19 pandemic. In spite of that, the temporal and spatial freedom that learners may consider a benefit of online learning can at the same time be a hindrance.

Moreover, according to Plaisance (2018), if online learning is not skilfully executed, it may cause disengagement and learners may be at risk of disconnection. A study by Rajab, Mohammad, Gazal, & Alkattan (2020) concerning online learning challenges reported that the major ones being communications, assessment, online education experience, technology use tools, time management, anxiety, and coronavirus disease stress. Furthermore, Ali (2017) reported that some learners were motivated to work harder in learning English using the Blackboard platform, and some other learners were demotivated to learn using Blackboard. Also, the study of the International Association of Universities conducted in 2020 about the impact of Covid-19 globally on the higher education institutes showed a negative influence on the quality of activities and the inequity of education opportunities.

According to Sahin and Shelley (2008), students who had great satisfaction with their online classes are those who are skilled to utilize online tools and these students considered online learning as an important way of communicating, sharing, and learning. In addition to that, another study revealed that the online interaction between the instructor and the student is a significant element that affects the satisfaction of students in the online learning environments (Paechter, Maier, and Macher, 2010).

The effectiveness of online instruction largely depends on learners' active learning (Fu, 2013). Also, Van de Pol, Volman, & Beishuizen (2010) emphasized the individualized learning support as highly relevant for students' motivation. Additionally, Hattie & Timperley (2007) outlined in their research an importance of individual support in terms of task-related feedback as one of the strongest predictors of students' achievement. Not only that student-teacher communication is important but also as pointed out by Epstein (1987), Ma, Shen, Krenn, Hu, & Yuan (2016), supportive teaching is

strongly interrelated and often even depends on the effective cooperation between teachers and parents.

As seen from the above findings, there are numerous and various factors students around the world faced in the online learning phase during the Covid-19 pandemic. Hence, we aimed to contribute with our own research and examine more specific experiences of students in our environment.

#### **4. Methodology**

To maximize insights, the participants in this study are students residing in Bosnia and Herzegovina and the State of Qatar. As no specific validated questionnaires related to the topic of this study were found, we created the questions ad hoc, based on the feedback given by students either in person, online, or in published journals.

Questionnaire for the participants consisted of 5 point Likert scale statements as well as open-end questions. An online, structured questionnaire was developed by using Google Forms. The participants were to answer the questions related to the grade level and country they live in. The rest of the questions pertain to details related to the topic of the research. The data was analyzed using descriptive statistics and thematic analysis.

#### **5. Results and Discussion**

##### **5.1 Demographics**

114 out of 160 (or 71.3%) of the respondents are students in middle school and 46 (or 28.7%) are attending high school. Both groups are attending international schools where English is a medium of instruction and taught as a second language. 92 participants are from Qatar and the rest (68) are from Bosnia and Herzegovina.

The survey took place at two international schools in different countries in order to get a broader perspective. Both schools have similar approaches in teaching English and are well equipped with tools and facilities allowing for more than traditional teaching and learning of a language. Therefore, students were somewhat familiar with online learning before the Covid-19 closure but, as stated earlier in this article, some aspects, such as testing, feedback, and direct instruction were provided in a traditional way - paper based and in person.

## 5.2 Perception

The prime objective of collecting data in this part was to understand the perception of the students towards online learning during the Covid-19 pandemic based on their experience. Hence, the first set of two questions asked students to give their honest opinion on the best and hardest parts of online learning during Covid-19 pandemic.

When asked about the hardest part of online learning, most answers students listed were the ones related to missing in person communication and lack of confidence to ask clarification questions or communicate in breakout rooms. Other repeating answers are as follows: being easily distracted and having difficulties with focus and motivation, technical issues and too much screen time, difficulty in understanding the assignments, taking tests, getting lower grades and failing to learn the content.

Some of the most common answers related to communication were that students were unable to get the answers on the spot due to not being confident to speak up or they had difficulties in getting the right information due to technology issues. Participants pointed out that technology created frustration when communicating as they were not able to get feedback promptly and in real time or couldn't hear the information properly.

**Participant 5:** *“When you want to talk, some people don't respond in the breakout rooms.”*

**Participant 10:** *“I wasn't able to understand what the teacher said and every time there was a problem with the Internet and also I was a little shy to ask the teacher for something.”*

**Participant 15:** *“Getting the teacher's attention, sometimes it was lagging.”*

Another common answer was lack of focus due to either spending too much time on devices or having too many distractions. What we can infer from the answers is that students found it difficult to stay motivated and attend lessons. This obviously affected the understanding of the content and assignment completion.

**Participant 14:** *“Being able to be fully focused and committed to my online work.”*

**Participant 76:** *“The hardest part of online learning was staying focused and understanding the assignments because I could not communicate with the teacher properly and the lessons were hard to understand.”*

**Participant 56:** *“Being focused on what the teacher is explaining.”*

**Participant 86:** *“Focusing online was hard throughout the day because we spent a lot of time in front of the screen and our eyes would hurt.”*

**Participant 13:** *“I didn't have any motivation towards online learning and really couldn't focus at all.”*

**Participant 37:** *“I was easily distracted.”*

Furthermore, other emerging issues that affected students' perception were problems with technology or not being prepared to use the online tools. Due to the changes and closure that happened suddenly, some students did not have readily available Internet connection at home, let alone their personal device and other tools.

**Participant 12:** *“Technical issues, (mic lag), and opening the camera.”*

**Participant 29** *“Learning how to adapt to change so quickly.”*

**Participant 31:** *“Listening in the glitching voices.”*

**Participant 40:** *“The Internet doesn't work most of the time and I don't understand as much.”*

**Participant 66:** *“Internet connection, can't understand well, all of the bad things on the iPad.”*

On the other hand, along with challenges, we wanted to examine the aspects of online learning that students enjoyed. Most of the answers listed for this question were the ones pertaining to being safe and enjoying the comfort of one's own home.

**Participant 21:** *“We were in the comfort of our home.”*

**Participant 26:** *“Studying in my own environment in a comfortable way.”*

**Participant 89:** *“I can be more safe and after I can sleep and have free time.”*

The rest of the survey was used to determine students' perception on the enjoyment in online classes, satisfaction with performance and how well they coped with online assignments. This part included Likert scale statements that arose from the feedback given by the students earlier either in person or online and it aimed to further examine their experiences with online learning.

When it comes to the enjoyment in online learning (Table 1), the majority of students (63) answered *Neutral* for the statement *I enjoyed learning online during the Covid-19 pandemic*, meaning they have neither a positive nor a

negative opinion. 17 participants (10.6 %) answered positively to this statement with Strongly Agree and 36 (22.4 %) answered with Agree. 19 participants (11.8 %) disagreed with the statement and 26 of them (16.1 %) answered with *Strongly Disagree*.

**Table 1:** Overall enjoyment in online learning

I enjoyed learning online during the Covid-19 pandemic	N	%
Strongly agree	17	10.6
Agree	36	22.4
Neutral	63	39.1
Disagree	19	11.8
Strongly disagree	26	16.1

From the above results, it is not hard to conclude that students did not have quite the best experience with online learning. This is further supported with the responses to the statement about enjoying online activities where 102 students out of 161 expressed that they didn't enjoy them. 39 were neutral and only 20 responded that they did enjoy (Table 2).

**Table 2:** Enjoyment in online activities

I enjoyed online activities better than the ones done at school.	N	%
Strongly agree	8	5
Agree	12	7.5
Neutral	39	24.2
Disagree	61	37.9
Strongly disagree	41	25.5

Since the responses to the statement about overall enjoyment in online learning during Covid-19 pandemic (Table 1) turned out to be a little bit more positive, this can be explained through the students' answers analyzed earlier where they claimed that online learning was enjoyable in a way that it allowed them to follow lessons from the comfort of their own home and remain safe. However, when it comes to lesson activities, they were affected by poor communication, distractions, and technical issues.

When expressing their satisfaction with learning outcomes (Table 3), 31 participants (19.3 %) answered that they are very satisfied and 44 participants (27.3 %) answered that they are satisfied. 43 participants (26.7 %) were



neutral. Those dissatisfied with learning outcomes make up 13.7 % or 22 participants and 21 participants or 13% were very dissatisfied.

**Table 3:** Satisfaction with performance

I am satisfied with my performance while learning online last year.	N	%
Very satisfied	31	19.3
Satisfied	44	27.3
Neutral	43	26.7
Dissatisfied	22	13.7
Very dissatisfied	21	13

Despite the issues mentioned previously, the majority of students are satisfied with their ability to cope and perform during online learning. These results were expected considering the students' answers stated earlier that they did their best considering the unprecedented situation.

### 5.3. Engagement

In order to find out the level to which students were engaged in their lessons we inquired about the level of difficulty of assignments, not just content wise but also in terms of utilizing different tools and platforms for those assignments.

Majority of the students reported that it was easy for them to work on online assignments (Table 4) as 32 participants (19.9%) responded with Strongly agree and 49 participants (30.4 %) responded with Agree. 40 participants responded with neutral (24.8%), 25 participants (15.5 %) disagreed with the statement, whereas 15 of them (9.3 %) strongly disagreed with the statement.

**Table 4:** Difficulty of online assignments

It was easy for me to work on my online assignments.	N	%
Strongly agree	32	19.9
Agree	49	30.4
Neutral	40	24.8
Disagree	25	15.5
Strongly disagree	15	9.3

As stated earlier, these students did occasionally participate in online activities before the pandemic closure and they had experience with online learning tools. Therefore, it is understandable that the majority of them stated that the work on the assignments was easy. As for the rest of the answers, it can be justified by the fact that they were not ready for the sudden shift to online learning and they needed more support with the transition in order to engage in the work.

As keeping focus in the lesson greatly affects the engagement, we also examined the ability to remain focused and follow lessons (Table 5). The majority of participants reported that it was not easy. Namely, 41 participants (25.5 %) strongly disagreed and 46 of them (28.6 %) disagreed with the statement. Only 5 students (3.1%) agreed strongly with the statement, and 29 (18%) responded that they agree with the statement. 40 students (24.8%) were neutral to the statement.

**Table 5:** The ability to remain focused

It was easy for me to remain focused on activities during online learning.	N	%
Strongly agree	5	3.1
Agree	29	18
Neutral	40	24.8
Disagree	46	28.6
Strongly disagree	41	25.5

As seen above, remaining focused seems to be the most challenging part for the majority of the respondents. It is not hard to understand that if students are distracted or busy doing something else while attending online lessons, their engagement and participation will drop. This eventually leads to not understanding the content, not being able to do the assignments, and bad grades.

Since technology and Internet access are an essential part of online learning and their malfunction can affect focus, statements related to it are included in this section as well (Table 6). 80 participants reported that they had necessary technology and solid Internet connection while learning online (30 or 18.6 % responded with *Strongly agree* and 50 or 31.1 % responded with *Agree*), whereas that wasn't the case with 33 participants (25 students or 15.5 %

responded with *Disagree* and 8 or 5% responded with *Strongly disagree*). 48 participants or 29.8 % responded with *Neutral*.

**Table 6:** Having necessary technology and Internet connection

I had all necessary technology and solid Internet connection while learning online.	N	%
Strongly agree	30	18.6
Agree	50	31.1
Neutral	48	29.8
Disagree	25	15.5
Strongly disagree	8	5

Furthermore, when it comes to familiarity and being able to use the main tools utilized in online learning, 117 students stated that it was easy for them to use online learning tools such as Zoom and Google Classroom (Table 7). 56 of them (34.8 %) responded with *Strongly agree* and 61 (37.9 %) responded with *Agree*. Only 21 students disagreed with the statement - 8 (5%) responded with *Strongly disagree* and 13 (8.1%) responded with *Disagree*. 23 students (14.3%) responded with *Neutral*.

**Table 7:** Using online learning tools

It was easy for me to use online learning tools (Zoom, Google Classroom, etc.)	N	%
Strongly agree	56	34.8
Agree	61	37.9
Neutral	23	14.3
Disagree	13	8.1
Strongly disagree	8	5

Majority of the students responded that they had their needs met in terms of technology; however, there is still a number of students who were unprepared to participate in online classes due to not having their personal device and Internet connection or not knowing how to make use of devices and online

learning tools, which can be explained with the fact of not expecting the unprecedented circumstances and the sudden change in education.

#### 5.4 Satisfaction with online learning outcomes

Since the focus of our research was on English language learners, we only inquired about the satisfaction with online learning in English language classes and their learning outcomes. 92 students reported that they were satisfied with their English language grades while learning online (41 or 25.5% responded with *Strongly agree* and 51 or 31.7 % responded with *Agree*. 32 students or 19.9 % responded with *Neutral*. Total of 37 students disagreed with the statement - 24 or 14.9% responded with *Disagree* and 13 or 8.1% responded with *Strongly disagree* (Table 8).

**Table 8:** Satisfaction with grades while learning online

I am satisfied with the grades I earned while learning online last year.	N	%
Strongly agree	41	25.5
Agree	51	31.7
Neutral	32	19.9
Disagree	24	14.9
Strongly disagree	13	8.1

79 students (49.4 %) reported that their final mark in English during online learning was 5. 50 students (31.3%) had final mark 4. 26 students (16.3 %) reported that their final mark was 3, 4 students (2.5%) had final mark 2, and 1 (0.6%) student reported failing English during online learning (Table 9).

**Table 9:** Final grade (online learning)

Final grade in ELA (online learning)	N	%
5	79	49.4
4	50	31.3
3	26	16.3
2	4	2.5
1	1	0.6

Situation with grades in the first year of in-person learning after Covid-19 closure is somewhat different. 90 students (56.3 %) reported that their final mark in English was 5. 55 students (34.4%) had final mark 4. 15 students (9.4 %) reported that their final mark was 3. No students reported final final marks 1 and 2 (Table 10).

**Table 10:** Final grade (in-person learning)

Final grade in ELA (in-person learning)	N	%
5	90	56.3
4	55	34.4
3	15	9.4
2	-	-
1	-	-

After comparing the above results, we determined that students received better grades during the in-person learning as more students had final marks 5 (excellent) and 4 (very good) and nobody reported final marks 1 (failing) and 2 (satisfactory).

## 6. Conclusion

The study raised the question “What is the perception of students towards online learning during Covid-19 pandemic?” and the results presented above indicate that students do not hold a completely favorable attitude as they did struggle with aspects of online learning that deviate from traditional classroom. As discussed above, students listed many challenges they faced in the process and the only positive sides mentioned were the ones being home and safe from the virus. This sudden transition significantly changed the perception about online learning they had earlier when only occasionally participating in online activities.

Second question “How much were students engaged in the educational process during online learning?” only confirmed the assumption that students being out of the classroom are easily distracted and find it hard to commit to their work if there is no teacher to directly supervise them. Some found working on the assignments easy, others found it difficult to navigate them. Therefore, it is essential to revise the difficulty of assignments given and adjust them to suit students’ proficiency level. Also, as visible from the results,

students need to be provided with training on how to make use of the technology and tools in order to maximize their engagement and participation in the lesson.

Lastly, answering the question “Are students satisfied with online learning outcomes last year and are there any differences between this year and last year's final grades in ELA?” , it was found that students, despite difficulties, still value their efforts and mostly are satisfied with the outcomes. This is despite the fact that the final grades were worse during the online learning than in the year after.

The study aimed to evaluate online learning experiences in order to improve its implementation as utilizing new technologies in language learning is especially important. Hence, it is utterly important to start changing students' perception by changing the way online learning is conducted, working on improving activities that will increase students' engagement and participation and keep them focused on the lesson.

While online learning has its own advantages, it can be inferred from this study that the traditional way of learning and being present in the classroom still holds value as students feel more comfortable to communicate, it is easier to receive feedback and ask for clarification, which altogether improve their performance. Furthermore, it is easier for teachers to navigate the lesson having students in the classroom, motivate them and help them keep focus on the topic.

Acknowledging the significance of online learning in the 21st century and the shortcomings in its application during Covid-19 pandemic, it may be noted that a variety of strategies need to be developed in order to change students' perception, maximize their engagement and participation, and improve the outcomes.

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# Myth or Reality: Digital Literacy Programme Implementation in Primary Special Schools in Nairobi, Kenya

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## Abstract

Information Communication Technology (ICT) enhances accessibility, efficiency, and quality of education. This study aimed to examine the status of ICT resources in teaching and learning in public primary special schools in Nairobi County, Kenya. Questionnaires, interviews, observation schedules, and manuals for document analysis were used to collect data from respondents. Research shows that most special schools have regular ICT resources provided by digital literacy programs (DLP), such as laptops and tablets. However, there is limited investment in specialized ICT resources to support the teaching and learning of children with disabilities and special educational needs. Research also shows that ICT resources are limited because most of the devices are kept by school administrators or teachers who do not know how to use them. The study concludes that limited investment in assistive and/or adaptive digital technologies and devices will harm the attainment of ICT skills as a fundamental skill by children with disabilities in special schools and special needs units. The study recommends the establishment of a technical committee on design innovation and equipment technology. This will complement DLP's efforts in providing resources for special schools to make better use of ICT for students with disabilities and special educational needs.

**Keywords:** Special Needs Education, ICT Resources, Assistive Devices, Assistive Technology

## Introduction

Information and Communication Technology (ICT) resources refer to hardware such as computers, scanners, copiers, mobile phones, printers, projectors, and broadcast technologies including radio and television as well as essential software that enhances teaching and learning. Information and Communication Technology resources need to be connected via computer networks and internet connections to enable sharing and distribution of data and information between teachers and learners. A networked school is not just a school with a physical network, but where there is an advantage, the use of sources outside the school network may be applied (Rodríguez et al., 2019). Like ICT curricula, ICT resources directly affect the outcomes and outputs of ICT use in teaching and learning. Information and communication technology (ICT) resources play a central role in transforming teaching, learning, and assessment practices for teachers and learners with special educational needs (Hersh, Leporini & Buzzi, 2020; Masih, 2018). Globally, it is recognized that teachers and schools are constantly committed to improving their pedagogy, the way their learners learn, and the way learning is assessed. With the increasing use of ICTs in today's contemporary society, it is essential to integrate ICTs into education systems at all levels (Lowder & Regmi, 2020).

Information and communication technologies are pervasive in society and continue to change the way we live our daily lives. Integration of ICT in teaching /learning has the potential to support the transformation of teaching, learning, and assessment practices in special schools, and it can link education policy with economic and social development (Rana & Rana, 2020). Likewise, there is growing evidence that digital technology is changing how learners learn, how teachers teach, and where and when learning takes place (Rana & Rana, 2020; Masih, 2018). Skills in ICT have been recognized as an essential skill in all the educational reforms taking place around the world (UNESCO, 2018). This statement is the real proof of education reform in developing countries like Kenya since 2011 and developed economies like Czech Republic as ICT resources in schools have been emphasized.

Learners with disabilities and special educational needs also need more open learning experiences to develop their higher levels, such as reflection, creativity, independence, cooperation, and mastery (Medina et al., 2021). When ICT resources are used effectively, it can provide all teachers, learners, and parents/guardians with the opportunity to develop these key skills (Hersh et al., 2020). Integrating ICT into the teaching, learning, and assessment of learners with disabilities is a complex undertaking and the mere presence of ICT in schools does not equate to its effective use (Enrique, 2018).

With the advent of ICT resources in developed countries, trends referenced include redesigning the way schools operate and the transition from learners as consumers to creators. (Passey et al., 2018). Obstacles noted include redesigning the role of teachers and scaling up educational innovations. Developed countries like Japan,

Britain, France, and Germany have unanimously confirmed the potential role of the ICT resources in helping to transform teaching, learning, and assessment practices in a very positive way in the long term (Enrique, 2018). In the long run, such a transformation will help improve student learning and prepare the young people to live, study and work in modern globalized societies (Akkari & Maleq, 2019).

The use of ICT resources for persons with disabilities is an important initiative that enables education systems worldwide to meet the challenges of inclusion (Hersh et al., 2020). Developed countries such as China, Germany, the US, and Japan have reform programs that include people with disabilities at all levels of education (Cha, Park & Seo, 2020). The implementation of the ICT strategy aims to enhance the continuous application and improvement of education. Similarly, in the recent past, many reforms in education have led to consideration of the key role that ICTs can play in transforming education systems so that learners are equipped with the knowledge and skills needed to meet the challenges posed by rapid growth. The world is changing (Barakabitze et al., 2019).

In Africa, the use of ICT assets in unique training remains in its preliminary degrees and most of the international locations threat being left at the back of technological development because of the gradual tempo at which they may be integrating ICT into their training system (Lloyd, 2020). Unfortunately, maximum growing international locations along with Sub-Saharan Africa, for example, Uganda, Ghana, Liberia Kenya, Zambia, and Sudan have restrained utility and use of ICT in Education, notwithstanding complicated ICT rules in Education being in place. Their rules are not conscious of the precise desires of the training zone with an emphasis on the usage of ICT for financial returns in outdoor schools (Achimugu, Oluwagbemi, & Oluwaranti, 2010).

In Kenya, the ICT policy was introduced in 2006 (CA, 2006). The policy's mission is to be a "prosperous ICT-based society of Kenya" with ICT at the heart of national development (Kashorda & Waema, 2014). This policy is intended to encourage the use of ICT resources and to promote the growth and development of e-learning at all levels of education with the objective of promoting teaching and learning (Pavel, Fruth & Neacsu, 2015). From the policy, relevant data on the use of ICT resources in teaching and learning in special schools are not provided. Therefore, the policy of providing ICT resources has not been based on the needs of special schools. This calls for research into ICT resources and their use in teaching and learning in special schools in Nairobi County. According to Kenya's vision 2030, if schools provide access to ICT, the quality of education will improve, and productivity will be enhanced (MOEST, 2003). The status of information and communication technology (ICT) resources in public primary special school schools in Kenya has not been adequately examined. Existing assessment reports come mainly from NGOs. This follows the Kenya Government's robust Digital Literacy Program (DLP). With the current implementation of the Competency-Based Curriculum (CBC), which recognizes ICT as

a core competency, a comprehensive assessment of the state of ICT resources in these schools becomes necessary to support policy and program implementation advocacy. For learners with disabilities and special educational needs, appropriate ICT resources not only improve access but also maintain the quality and relevance of education.

### **Purpose of the Study**

The main aim of this study was to establish the status of ICT resources for the implementation of a digital literacy programme in public primary special schools in Nairobi County, Kenya. The status of these resources is examined in three aspects: availability, functionality, and adequacy. This will assist to find out whether DLP implementation in special schools in Nairobi County is a myth or a reality.

### **Literature Review**

Lack of ICT resources can be a serious impediment to the use of ICTs in teaching and learning in schools, especially in developing countries like Kenya. Without ICT resources, Kenya may not integrate ICT in schools to the extent expected or required. Therefore, resource planning and investment in ICT are necessary if Kenya is to realize its huge economic and development potential. The availability of ICT equipment in schools in Kenya is still very low. In investigating internet availability and accessibility, Kenyan schools found that email is still not recognized as a tool for collaboration between learners and teachers (Makokha & Mutisya, 2016). The authors further reiterated that internet access was very limited and when available it was used for administrative purposes only. Research shows that almost 40% of these schools have less than 10 computers and are therefore not suitable for teaching and learning. More than 20% have less than 5 computers, indicating that these computers are mainly for administrative purposes.

For some special schools, facilitating resources such as electricity will not qualify even with an ICT donation opportunity. Typically, the criteria for placing computers and ICT equipment in schools are security, power supply, and the availability of ICT-savvy teachers, among other factors (Rodríguez et al. al., 2019). Due to a lack of electricity connections, some schools use generators to power computers (Gayapersad et al., 2019). Such energy sources are inconvenient because they are often used at night. As a result, few teachers can use technology, resulting in a low frequency of ICT use. However, a program to improve teachers' access to computers has been launched.

A thorough rationale is needed before starting to use ICT resources in schools and classrooms. In general, with the increasing availability of computer equipment, teachers should not focus on machines but should focus on their primary role as educators. Teachers need to expand their imagination with the realization that as computer technology develops, they will be able to achieve more goals (Kashorda & Waema, 2014).

## **The use of ICT in Education**

The education sector has been influenced by ICT, which has certainly influenced teaching, learning, and research (Achimugu et al., 2010). ICT resources have the potential to accelerate, enrich and deepen skills, motivate, and engage learners, help connect school experiences with work practices and create economic viability for students as future workers, as well as enhance education and help schools change (Pannen, 2015). In a rapidly changing world, basic education is essential for an individual to access and apply information technology.

Teaching has always been emphasizing content and for many years course work has been revolving around textbooks. Teachers have taught through lectures and presentations interspersed with tutorials and getting-to-know activities designed to consolidate and rehearse the content. Contemporary settings are now favoring a curriculum that promotes competency and performance. Curriculums have started emphasizing capabilities and are concerned more with how the information will be used than with what the information is. Contemporary ICT can provide strong support for all these requirements and there are now many outstanding examples of world-class settings for competency and performance-based curriculum that makes sound use of the affordances of these technologies (Sharma, 2015). The integration of information and communication technologies could help revitalize teachers and learners in special schools. This can help to improve and develop the quality of education by providing curricular support in difficult subject areas. To achieve these objectives, teachers need to be involved in collaborative projects and the development of intervention change strategies which should include teaching partnerships with ICT tools. Further, there are three conditions necessary for teachers to introduce ICT and use it in their classrooms: teachers should believe in the effectiveness of technology, should believe that the use of the technology will not cause any disturbances in learners learning, and finally in their control over the new technology (Cheung & Slavin, 2012). However, research studies have shown that most teachers do not make use of the potential of ICT to contribute to the quality of learning environments despite the value they attach to the technology (Butler, Hallissy, & Hurley, 2018).

The benefits of the use of ICT technology are realized only when confident teachers are willing to explore new opportunities for changing their classroom practices by using ICT (Jamieson-Proctor, Burnett, Finger, & Watson, 2006). Consequently, the use of ICT does not only enhance learning but also prepares the next generation for future lives and careers (Wondemtegegn, 2018). The changed pool of teachers will come with changed responsibilities and set of skills for future teaching involving high levels of ICT and the need for more facilitative than didactic teaching roles (Dart et al., 2017).

The flexibility in time-space accounted for by the integration of the ICT resources into teaching and learning processes contributes to increasing interaction and reception of information in education (Baskin & Williams, 2006). Such possibilities suggest

changes in communication models and in the teaching and learning methods used by teachers by giving way to new scenarios that favor both individual and collaborative learning in schools. The use of the ICT resources in an educational setting by itself acts as a catalyst for change in the domain. ICT tools encourage and support independent learning in schools'

The influence of technology on supporting learners' abilities will continue increasing. In the past, the conventional process of teaching has revolved around teachers planning and leading-learners through a series of instructional sequences to achieve the desired learning outcome. Typically, these forms of teaching have revolved around the planned transmission of a body of knowledge followed by some forms of interaction with the content to consolidate the knowledge acquisition. Learning approaches using contemporary ICT provide many opportunities for constructivist learning through their provision and support for resource-based, student-centered settings and by enabling learning to be related to context and practice (Damşa & De Lange, 2019).

The use of ICT resources in learning settings supports various aspects of knowledge construction and as more and more learners use ICT in their learning processes, the more pronounced their impact becomes. Teachers generate meaningful and engaging learning experiences for their learners strategically using ICT to enhance learning. Learners enjoy studying, and the independent inquiry that innovative and appropriate use of ICT helps to foster. The study established that very few schools were using ICT mostly for computer classes and office work.

## **Methodology**

### **Study Design**

This study used the Mixed Method Research (MMR) Design in which both quantitative and qualitative datasets are collected and analyzed concurrently and triangulated in reporting the results.

### **Sampling**

The study adopted a multi-stage sampling technique in identifying teachers who participated in the study. The first stage involved purposive sampling of Special schools in Nairobi County to ensure representative of as many disability categories as possible. The second stage involved random sampling of individual teachers based on the individual school's staff register. Systematic random sampling was used to select teachers from the list of staff register which was the basic sampling frame in this study. Further, purposive sampling was used to identify key informants from the Ministry of Education (MOE).

### **Instruments and Data Collection**

Data was collected through the Computer Assisted Personal Interview (CAPI). In this approach, respondents were contacted through mobile contact and given a detailed

explanation of the background and motivation of the study, and requested to participate in the research. The email containing the link to the online self-administered tool was sent only to those respondents who gave consent and were willing to participate in the study. Responses were received in MS Excel file for analysis. However, observations were conducted by the researchers in individual schools. Table 1 below presents a summary of the sampling matrix showing key participants and their demographics.

Table 1

*Demographic Characteristic of Respondents*

<b>Demographics of teachers</b>	<b>Frequency</b>	<b>Percent</b>
<b>Sex</b>		
Female	72	72.7
Male	27	27.3
<b>Age bracket</b>		
40 – 49	47	47.5
50 – 59	43	43.4
30 – 39	8	8.1
Below 30	1	1
<b>Teaching Experience</b>		
More than 10	50	50.5
4 – 7	23	23.2
8 – 10	14	14.1
1 – 3	12	12.1
<b>Highest Qualification</b>		
Bachelor’s Degree	48	48.5
Master’s Degree	27	27.3
Diploma	19	19.2
PhD	5	5.1
<b>Total</b>	<b>99</b>	<b>100</b>

**Data Analysis:** Statistical and thematic techniques were used in the analysis quantitative and qualitative datasets respectively. Statistical methods used in this study were mainly descriptive and bivariate forms of analyses including frequencies, percentages, and cross-tabulations. Thematic analysis technique used in this study was adopted from the six-phase model proposed by Braun and Clarke (2006) as follows: (1) Familiarizing with your data, (2) Generating initial codes (3) Searching for themes, (4) Reviewing themes, (5) Defining and naming themes and (6) Producing the report. Triangulation of quantitative and qualitative evidence was done continuously, and a final research report was produced.

**Ethical Considerations:** In conducting this study, relevant authorizations were sought. First, ethical clearance was sought and obtained from the University. The data collection permit was given by the National Commission for Science, Technology, and Innovation (NACOSTI). Background and motivation of the study were provided to all target respondents and data was collected from those who had given informed consent to participate in the study.

### Results and Discussions

Teachers were provided with a list of 16 ICT resources and required to indicate whether the said resources were available or not available. For those that were available, teachers were then required to indicate whether they were adequate or inadequate. Table 1 presents frequency distribution sorted by the availability of ICT resources.

**Table 1**

Summary Statistics of Availability of ICT Resources in Schools

ICT Resources	Rank	Available (%)		Adequate (%)		
		Yes	No	Yes	No	Not sure
Electricity	1	93%	7%	24%	2%	74%
	2			27%	14%	
Space for storage of laptops	2	89%	11%			59%
	3			24%	16%	
Television Set	3	83%	17%			60%
	4			30%	26%	
Laptops	4	74%	26%			44%



Printer and Scanner	5	67%	33%	30%	17%	53%
Teacher Digital Device	6	64%	36%	32%	46%	22%
Desktop Computers	7	63%	37%	29%	19%	52%
LCD Projector	8	63%	37%	24%	18%	58%
Radio	9	62%	38%	30%	15%	56%
Video Decks	10	54%	46%	26%	30%	43%
DVD/VCDs	11	54%	46%	42%	32%	26%
Desktop Computers with JAWS	12	27%	73%	22%	37%	41%
Internet connectivity	13	27%	73%	33%	19%	48%
Adapted computers	14	23%	77%	17%	30%	52%
Standing generators or UPS	15	9%	91%	44%	33%	22%
Mobile phones provided by the school	16	7%	93%	43%	14%	43%

The results show that in terms of availability, electricity, storage space, and television sets were reported to be available by more than 75% of teachers. In terms of adequacy, 24% of teachers reported that electricity is adequate, 27% reported that storage space is adequate and 24% reported that television sets were adequate. The stability of electricity supply throughout the week was considered a measure of the adequacy of electricity. It was curious to note that a significant majority of teachers, 59% and above did not comment on the adequacy of electricity, storage space, or television set. The probable reasons were that either they did not want to commit themselves or they chose to ignore the response.

Laptops were reported to be available in schools by 74% of teachers out of which only 30% of teachers indicated that the available laptops were adequate, 26% reported

that they were not adequate and 44% of teachers could not comment on the adequacy of laptops in their schools. Printers and scanners were reported to be available by 67% of teachers out of which only 30% indicated that the available printers were adequate, 17% said they were not adequate while 53% of teachers could not comment on the adequacy of the available printers and scanners.

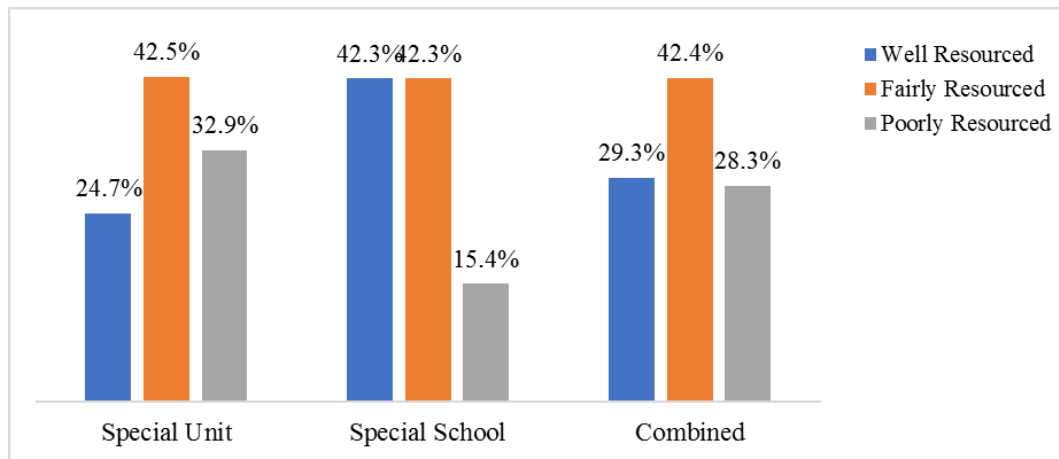
The resources that were reported to be available in schools by between 55% and 64% of teachers include teacher digital devices (64%), desktop computers (63%), LCD projectors (63%), and radio (62%). In terms of adequacy, 32% of teachers reported that teacher digital devices are adequate, 46% said they are not adequate while 22% could not comment on the same; 29% of teachers said the desktop computers were adequate, 19% said they were not adequate while 52% could not comment on the adequacy of desktop computers; 24% said LCD projectors were adequate, 18% said they were not adequate while 58% could not comment about the adequacy of the available LCD projectors; finally it was found that only 30% of teachers reported that available radios were adequate, 15% said they were not adequate while 56% could not comment about the adequacy of available radios.

The resources that were reported to be available in schools by between 45% and 54% of teachers include; video decks (54%) and DVD/VCDs (54%). In terms of adequacy, 26% of teachers said the available video decks are adequate, 30% said they are not adequate while 43% could not comment on the adequacy of the available video decks. Similarly, 42% of teachers indicated that the available DVD/VCDs are adequate, 32% said they are not adequate while 26% could not comment on the adequacy of the available DVD/VCDs.

The resources that were reported to be available in schools by less than 30% of teachers include desktop computers with JAWS (27%), internet connectivity (27%), adapted computers (23%), standing generators or uninterrupted power supply [UPS] (9%) and mobile phones provided by the school (7%). Similar trends regarding adequacy were observed where a significant majority (between 22% and 52%) of teachers are not able to comment on the adequacy of the available resources. Similar studies in different contexts also mirror the trend of ICT resources lacking in schools. For instance, in Greece, Nikolopoulou and Gialamas, (2016) found that many schools did not have internet connections, and many lacked adequate equipment for the successful integration of ICT for classroom teaching.

The scores on the availability and adequacy of the 16 pre-determined ICT resources were used to create three-point categorical classes 'Well resourced', 'Fairly resourced', and 'Poorly resourced'. The results show that 29.3% of teachers reported that their schools are well resourced, 42.4% resourced while 28.3% of teachers reported that their schools are poorly resourced. Figure 1 presents a comparative summary of the availability of ICT resources between special units and special schools.

**Figure 1**



*Availability of ICT in Special Schools and Special Units*

Information about the availability of ICT resources in special schools and units was obtained from teachers. The results show that 24.7% of special unit teachers and 42.3% of special education teachers reported that their schools had sufficient resources to implement DLP. Another 42.5% of special unit teachers and 42.3% of special education teachers showed that their schools had the resources to implement DLP. Meanwhile, 32.9% of special unit teachers and 15.4% of special education teachers reported that schools were not equipped to implement digital literacy programme.

Using the observation checklist and with the support of school authorities, researchers examined several school records to determine the availability of ICT devices in special schools and units. The results are shown in Table 2. It has been shown that most ICT devices such as desktop computers, laptops, tablets, and projectors are available in most institutions. Special equipment such as embossers, scanners, large prints, photocopies, communication devices for the hearing impaired (TDD), talking clocks/clocks, JAWS / NVDA, dolphin pens, communication devices for the hearing impaired (TDD), speech recorders, sound recorders, etc. However digital devices and software were still very limited. Other common devices such as LCD projectors, tablets, and laptops were available to teachers but were blocked by the head of the institution. The results of this study show that ICT devices are available and are in line with the government's commitment to providing laptops to all children, regardless of disability.

**Table 2**

*Frequency Tabulation of Availability of ICT Devices (Sample Size n=41)*

<b>S/N</b>	<b>ICT devices</b>	<b>Number</b>	<b>Percent</b>
i)	Desktop computers	33	80%
ii)	Laptops	27	66%
iii)	Tablets	27	66%
iv)	Projector	22	54%
v)	CCTVs: Potable CCTV system,	14	34%
vi)	Handheld magnifying cameras	12	29%
vii)	Embossers, scanners, large print, photocopier	3	7%
viii)	ICT textbooks	3	7%
ix)	Internet connectivity	3	7%
x)	Ipads, iPhones, iPod	3	7%
xi)	Telecommunication Device for the Deaf (TDD)	2	5%
xii)	Calculators: Low Vision, Scientific,	2	5%
xiii)	Talking watch/clocks	2	5%
xiv)	JAWS	1	2%
xv)	Dolphin pen, NVDA Kurzweil, 1000,	1	2%
xvii)	Telecommunication, Device for the Deaf (TDD)	1	2%
xviii)	Voice recorders: Tape recorder, Smartpen,	1	2%
xix)	Notetakers: Book Sense, Braille sense,	1	2%
xx)	Storage room	1	2%

These findings can be used to infer that other than the availability of resources, there could be a problem with the utilization of the same resources since most teachers cannot tell whether the available resources are enough. Further, it can be inferred that special schools have been equipped in the same way regular schools are equipped since assistive technologies such as JAWS and adapted computers are available in less than 30% of schools. This could be an indicator of a potential challenge in the implementation of DLP for children with disabilities who required adapted technologies to learn. These findings are supported by studies done by Wahome (2011) and Wanjala (2013) who found the ICT tools available in most schools where

computers and printers were used in teaching and learning and publishing examinations. Additionally, this is in line with the Ministry of ICT Policy which postulates that ICT is expected to be integrated seamlessly into teaching and learning across all levels of education in Kenya (Ministry of ICT, 2016). An interview with the key informants revealed that although the MoE had supplied ICT devices to special schools and units in Nairobi County, not most devices were supplied. On supply of DLP devices to special schools, one KI reported that:

*Devices have been supplied adequately. However highly specialized devices are not yet supplied, from what we get from reports only 75 percent were done but no concrete evidence in addition devices is not necessarily adapted, and some were for specific disabilities. Delayed procurement no proper consultation, so specifications are not the correct ones and devices, arrived late and work was not evidence-based we skipped baseline hoping that now in phase 2 we will do better (Interview MOEF2, October 2020).*

Similarly, these findings are supported by the sector policy for learners and trained with disabilities that state that most of the learning materials in the market are not adapted, becoming a challenge in accessing appropriate and specialized teaching and learning materials for learners and trainees with disabilities. Further, this limits the teacher in employing a variety of content in teaching and learning activities for effective curriculum delivery. For an institution to fully integrate information and communication technology in its learning, there should be resources that fully support the integration. The researcher used an observation checklist to ascertain if the schools have ICT resources.

Consequently, lack of adequate ICT resources in schools can be explained by the insufficiency of funds and low levels of ICT training among the teachers. The findings concur with a study by Kibuku, Ochieng and Wausi (2020) that established that some of the major barriers in developing maturity when it comes to utilization of technology in learning include teachers' attitude, lack of access, lack of training on the utilization of the ICT resources as well as inadequate ICT skills in general. More precisely, when it comes to trainees' attitudes there is an indication of lack of independence in learning and devoid of commitment to take responsibility for self-learning.

Other challenges noted include lack of a standard course curriculum, learning materials as well as inadequate learning resources that integrate the utilization of ICTs. Additionally, there is also the barrier of phobia towards technology among teachers and teacher trainees this deems their confidence and readiness to utilize ICT support in the teaching and learning process. This is further aggravated by the lack of qualified professionals in ICT to support teachers in the incorporation of ICTs in schools and particularly in the learning and teaching process. This can be attributed to the high levels of 'brain drain' whereby professionals in these areas opt to look for better-paying jobs in other countries where they are well compensated commensurate to their services.

## Conclusions

The researcher sought to establish the current state of availability of ICT resources for implementing DLP in public special schools. The study found that items such as electricity, storage space, television sets, laptops, printers and scanners, teacher digital devices, desktop computers, LCD projectors, and radio were available in schools. In terms of adequacy, 30% of teachers reported that they were adequate, 26% reported that they were not adequate and the majority 44% of teachers could not comment on the adequacy of these items in their schools. The study also revealed that Desktop Computers with JAWS, internet connectivity, adapted computers, standing generators or uninterrupted power supply [UPS] and mobile phones provided by the school were available though in small supply. Similarly, regarding adequacy, a significant majority of teachers could not be able to comment on the adequacy of the available resources. Finally, the study showed that special schools were resourced while special units were poorly resourced in terms of ICT devices to implement DLP. To improve the implementation of ICT in teaching and learning in public primary schools in Nairobi County, there is a need to handle challenges related to the availability, adequacy, and utilization of ICT devices in those special schools.

## Recommendations

The study recommends the establishment of collaborative partnerships among government agencies to ensure adequate ICT (hardware and software) and infrastructure are made available for all categories of learners with special needs and disabilities. Such partnerships could be the ministry of education (through the School Equipment Production Unit (SEPU) and Kenya Institute of Special Education (KISE)) in collaboration with the Ministry of ICT to consider the establishment of a technical working committee on innovation for the design of assistive devices and technologies. Further, the study recommends the institutionalisation of Public-Private Partnerships (PPP) between the government, non-governmental organizations (NGOs), Faith-Based Organisation (FBOs), Community-Based Organizations (CBOs), and other development partners with the aim of formulating sustainable ICT infrastructure programs. Assistive devices for CWDs can be very expensive and this calls for concerted effort and determination from all stakeholders to make it certain. If this is not done and well addressed the DLP implementation in primary special schools in Nairobi and by extension will be a myth and not a reality.

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# Some Reflections on Reference in the Teaching of French as a Foreign Language Context

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## Abstract

Grammatical and lexical cohesion are necessary conditions to guarantee a text's coherence (Halliday and Hasan 1976). Grammatical cohesion is classified into four types of relation: reference, conjunction, substitution, and ellipsis. This study aims to investigate the use of the cohesive device of reference in written discourse produced by users/learners of French as a foreign language, to explore the kind of references they prefer and to highlight the difficulties they come across. Our study is based on a learner corpus composed of written productions of Greek-speaking users/learners of French who participated in National Foreign Language Exam System (Κρατικό Πιστοποιητικό Γλωσσομάθειας, ΚΠΓ). We used a sample of texts produced by candidates who participated in the examination willing to be certified at the levels B (Independent user) and C (Proficient user) of language proficiency according to the 6-level scale of the *Common European Framework of Reference for Languages* (Council of Europe 2001).

**Keywords:** Reference, anaphora, cataphora, National Foreign Language Examinations (ΚΠΓ), French as a foreign language

## 1. Introduction

The ultimate purpose of the building up of the communicative competence is the attainment of a successful communication in any social context. Written communication requires the elaboration of clear, cohesive, well-structured texts without ambiguities that may prevent understanding. Well-formed texts are coherent texts, in other terms, texts which “must be semantically well-constructed and coherent linguistic units” (Halliday & Hasan 1976).

In the context of searching for, and achieving, the coherence of a text, the rule of repetition plays a prominent role. Recursive elements should be included in the text as a mandatory condition attached to the homogeneous linear development. The repetition of these units permits to link clauses or sentences (Charolles 1978 : 14-15).

Reference is the set of grammatical resources that allow the speaker to indicate whether something is repeated from somewhere earlier in the text, or whether it has not yet been repeated in the text (Thompson 2004). Anaphoric and cataphoric referencing are related cohesive devices with a different direction. They are both subsumed under the generic term called *endophora* (Maingueneau 2000 : 172). *Anaphora* is the term which describes the relation of elements that contribute to the coherence of discourse and organization of the text when these elements follow the linguistic referent in the discourse. On the other hand, in the case of *cataphora*, these elements precede the referent (Riegel, Pellat & Rioul 1994 : 612).

There has been already a focus on anaphora by linguists working on applied or corpus linguistics because anaphoric phenomena can provide us information on syntactic description of languages and important clues to Natural Language Processing. They can tell us “how discourse is constructed and maintained – how linguistic patterning above and beyond the sentence is arranged” (Botley & McEnery 2000 : 3).

The purpose of this study is to make a first attempt to explore whether, and to what extent, reference is used adequately in written discourse of users/learners of French as a foreign language. Their sensibilization in the use of the appropriate elements could become a part of the written text analysis in classroom in order to help them to cope with difficulties, improve their skills and achieve the best results.

## **2. The Common European Framework of Reference for Languages (2020)**

The user/learner of a foreign language is nowadays considered as a social agent. Since the objective of the contemporary curricula is the development of users/learners' communication skills, language awareness, intercultural awareness and the ability to interact and mediate, the development of linguistic, sociolinguistic and pragmatic competence needs to act complementarily in the classroom of the foreign language. Coherence and cohesion, together with flexibility to circumstances, turntaking and thematic development, have been mentioned as one of the aspects of discourse competence in the *Common European Framework of Reference for Languages* (Council of Europe 2001 : 124-125) and they continue to be key concepts in the more recent Companion Volume (Council of Europe 2020 : 140-141).

At the C2 level, users/learners “can create coherent and cohesive text making full and appropriate use of a variety of organizational patterns and a wide range of cohesive devices.” At the C1 level, they “can produce clear, smoothly flowing, well-structured language, showing controlled use of organizational patterns, connectors and cohesive devices. Can produce well-organised, coherent text, using a variety of cohesive devices and organisational patterns.”

As it concerns the B2 level, users/learners: “can use a variety of linking expressions efficiently to mark clearly the relationships between ideas”, “can use a limited number of cohesive devices to link their utterances into clear, coherent discourse, though there may be some “jumpiness” in a long contribution”, “can produce text that is

generally well-organised and coherent, using a range of linking expressions and cohesive devices, and “can structure longer texts in clear, logical paragraphs.” Finally, at the B1 level, users/learners “can introduce a counter-argument in a simple discursive text (e.g. with “however”)”, “can link a series of shorter, discrete simple elements into a connected, linear sequence of points”, “can form longer sentences and link them together using a limited number of cohesive devices, e.g. in a story” and “can make simple, logical paragraph breaks in a longer text”.

### 3. Methodology and Corpus

Textual coherence should be investigated in extended discourse contexts. Due to their structure, corpora may provide all information required (Biber, Conrad & Reppen 2005). Our study is based on a learner corpus composed of writing data in French. Written composition activities were produced by candidates who participated in the differentiated and graded examinations of the National Foreign Language Exam System (Κρατικό Πιστοποιητικό Γλωσσομάθειας, ΚΠΓ), which are organized twice a year under the auspices of the Hellenic Ministry of Education.<sup>1</sup> The Greek state certificate for foreign language proficiency views linguistic pluralism as valuable to contemporary societies and offers exams in several European languages. The competences measured with the test papers are four: Reading Comprehension and Language Awareness, Writing and Written Mediation, Listening Comprehension, and Speaking and Oral Mediation.

The digitized corpus is enriched in an ongoing basis to maintain a balance in the representation of language proficiency levels (A1-C2), types of tasks, text types and communicative contexts to which candidates are asked to respond using the foreign language. Greek is the common language of all test takers. It is worth noting that the candidates taking these exams differ in their age group and literacy level. They also come from different regions and educational environments.

A criterion figuring among the evaluation criteria for the writing test is related to *text grammar* (text organization, coherence and cohesion). “Raters are trained to assess the degree to which candidates have managed to produce a coherent and cohesive script. *Coherence* refers to the presentation of ideas in a logical and understandable way. Candidates are expected to produce coherent texts by drawing on knowledge of how to organize and present their ideas from their previous experience as text producers and from their experience as readers.”<sup>2</sup>

In the present study, we use data gathered from written productions submitted for certification at levels B and C. We intend to investigate the variety in the organization and complexity of reference in discourse. As regards level B, candidates’ task was to: a) write an email to a friend to invite him/her to the 9th Festival of Plurilingualism (approximately 80 words), and b) write, and post on the website of *Le Monde*, an

<sup>1</sup> [https://rcel2.enl.uoa.gr/kpg/en\\_index.htm](https://rcel2.enl.uoa.gr/kpg/en_index.htm)

<sup>2</sup> [https://rcel2.enl.uoa.gr/kpg/gr\\_kpgcorner\\_jul\\_aug2009.htm](https://rcel2.enl.uoa.gr/kpg/gr_kpgcorner_jul_aug2009.htm)

article about the benefits citizens could enjoy from initiatives held by the municipalities of their country (approximately 100 words). At level C, candidates were asked to write an article which would be published on the site *www.doctissimo.fr*. This article should analyze the contribution of sports to the strengthening of social ties and explain how the public authorities could promote sports practice (approximately 350 words). The written outputs were expected to be informative and persuasive texts.

We used a sample of about 7000 words at levels B and C respectively. It must be noted that the corpus used was not annotated as regards anaphoras. This study was undertaken from a qualitative approach because elements used as anaphoric had to be separated manually after their automatic retrieval by means of a concordancer. Cases of exophoric elements (Martin 1992 : 122), e.g. definite articles, should be eliminated. Unitex was the tool we used to analyze our textual data. Unitex/GramLab<sup>1</sup> is an open source, cross-platform, multilingual, lexicon and grammar-based corpus processing suite.

In the sections presented below, we turn our attention to the pronominal and the lexical anaphora as well as the cataphora.

#### **4. Pronominal Anaphora**

Pronouns are intended as a tool for the achievement of the referential continuity in discourse (Brown & Yule 1983). Several categories of pronouns may be used as anaphoric terms: personal, demonstrative, possessive, relative, indefinite, numeral. In both levels, personal pronouns predominate contrary to demonstrative pronouns. We noticed a quite significant presence of relative pronouns and the absence of possessive and numeral ones. Anaphoricity is not present only in the same sentence, it can also be observed in the context. As Ariel (1988 : 69) points out about the anaphoric references, “pronouns are predominantly used when the distances are short”. In many examples, the referent is mentioned in the first sentence and the pronouns, present in the sentences that come after, get their meaning from it. Anaphoric chains, that is succession of anaphoric elements, are not very common but there are examples where the pronouns used are the adequate ones.

Partial representation with *en* and sequences of clitic pronouns, e.g. *le lui, la leur*, have not been found in our sample corpus. The users/learners preferred to repeat the lexical elements used previously. Cases of zero anaphora were not observed, and this can be explained by the fact that they are probably unfamiliar with this characteristic of oral discourse. There were rare cases of omitting the complement of the verb needed to be represented by a pronoun:

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<sup>1</sup> <https://unitexgramlab.org/>

*Il faut visiter le stade et participer dans ce programme parce qu'il est fantastique. Il ne faut pas négliger.* [You must visit the stadium and participate in this program because it is fantastic. It should not be overlooked.]<sup>1</sup>

Anaphoras belonging to the nominal category are the most frequent. Anaphoras with a verbal or an adjectival referent were not attested in the sample. This fact could be interpreted as a consequence of the difficulty faced by Greek-speaking learners to replace an adjective with *le* because of the absence of this possibility in Greek, e.g.: *Ils sont fiers d'eux. Ils le sont.* [They are proud of themselves. They are.]

What is needed to point out are the inappropriate and/or ungrammatical choices. If the learner makes a wrong decision because of choosing an anaphora that does not correspond to the referent, the understandability of the context is jeopardized. Ambiguous co-referencing in the text is in all likelihood due to the absence or the erroneous use of a pronoun. In the following text, the adjective *compétitive* agrees in gender and number with *personne*, whereas, immediately after that, *il* is used instead of *elle*. Similarly, in the case of *capacités*, there is no agreement in gender with the adjective *dernier*, but with the determiner *ces*, being common in both genders.

*Si une personne veut être compétitive au marché mondial, il doit acquérir des capacités. C'est vrai que la plupart des cours ne fournissent pas ces derniers.* [If a person wants to be competitive in the global market, he must acquire skills. It is true that most lessons do not provide these.]

In the following example, the referent of *ils* should be *les responsables*:

*Les volontaires seront encouragés par les responsables et ils les aideront à développer leurs connaissances.* [The volunteers will be encouraged by people in charge and they will help them to develop their knowledge.]

It is noteworthy that misunderstandings as regards the writer's intention may be provoked by such faults.

The incorrect choice of *qui* or *que*, although it was found very rarely at level B, is another point to be noted which shows the insufficient acquisition of the relative pronouns.

*Ceci* and *cela* are two neutral demonstrative pronouns with a subtle difference in their usage. *Ça* is the informal version of the latter. *Ceci* is used to refer to something which shall be mentioned and is a cataphoric device. *Cela* refers backward to something that has already been mentioned. Users/learners of French cannot always distinguish the role of these elements and select randomly one of them. In our sample, we found *cela* 13 times at level C and once at level B. We found no occurrence of *ceci* in both levels. It could be reasonably assumed that, at level C, the knowledge about the colloquial

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<sup>1</sup> Examples translated

use of *ça* would have been acquired. Counterintuitively, the results are different. *Ça*<sup>1</sup> occurred 3 times at level B and 15 times at level C, where it was used incorrectly. It must be noted that these productions received low assessment scores in all categories of evaluation criteria.

## 5. Lexical Anaphora

Anaphoric noun phrases were found in both levels. Definite articles, demonstrative and possessive determiners were used with an anaphoric functioning. Several types of associative anaphora (Kleiber 2001: 55-57) were found especially belonging to the type *members-collection: famille-parents* [family-parents], *personnes-enfants* [persons-children], *loisirs-sport* [hobbies-sport]. There were also observed sequences of functional associative anaphoras.

Faithful anaphora<sup>2</sup>, “a case in which the referent is not recategorized” (Willemse, Davidse & Heyvaert 2009 : 31), is present at both levels to represent several referents.

The unfamiliarity of users/learners with the importance of the interdependence of discourse elements not only inside the sentence limits but also in the entire text is plainly marked in cases like the one hereunder, where, apart from the deficient use of connectives and the unclear link between concepts concerning several *capacités*, the repetition of the noun *personnes* disorients the reader.

*Les élèves d'aujourd'hui doivent acquérir des capacités certaines pour survivre dans notre monde globalisé. En d'autres termes, ils doivent avoir la capacité d'analyser des affaires internationales. C'est nécessaire de coopérer avec des personnes qui viennent d'autres civilisations. Les personnes qui vont acquérir ces capacités seront mieux équipées.* [Students of today must acquire certain skills to survive in our globalized world. In other words, they must have the ability to analyze international affairs. It is necessary to cooperate with people who come from other civilizations. People who acquire these abilities will be better equipped.]

There were also occurrences of unfaithful anaphora, as it can be observed in the case of the hyponym *sentiments* or the synonyms *participants* and *bénévoles*:

*Les élèves ont du stress et des angoisses. Au fil des années, ces sentiments peuvent devenir répressifs.* [The students have stress and anxieties. Over the years, these feelings can become repressive.]

*Les participants peuvent obtenir de l'expérience professionnelle. Ces bénévoles peuvent travailler dans plusieurs postes.* [Participants can gain work experience. These volunteers can work in several positions.]

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<sup>1</sup> «Lorsque /ça/ renvoie à la situation, il est « déictique » ; quand il réfère au discours, il est anaphorique.» (Maillard 1974 : 66)

<sup>2</sup> *Anaphore fidèle* and *anaphore infidèle* (Maingueneau 2000 : 175) were translated as *faithful anaphora* and *unfaithful anaphora* (Willemse, Davidse & Heyvaert 2009 : 31).

In the example set out hereafter, *ce besoin* probably replaces two word sequences: *développement des compétences globales* and *naissance des compétences et des capacités*:

*En ce qui concerne les raisons du développement des compétences globales, nombreuses raisons ont contribué à ce besoin. Le monde entier sait la problématique qui a conduit à la naissance des compétences et des capacités. Ce besoin a...* [Regarding the reasons for the development of global competencies, many reasons have contributed to this need. The whole world knows the problem that led to the birth of skills and capacities. This need has...]

Cases where the anaphora is not a pronoun but a noun phrase were noted, e.g. in the following example *cet âge* is the anaphora referring to the referent *quinze ans*:

*Salut ! Je m'appelle Martha et j'ai quinze ans. Tous les adolescents dans cet âge ont des problèmes.* [Hi! My name is Martha and I am fifteen years old. All teenagers in this age have problems.]

To reformulate or explain the referent, an important variety of noun phrases *ce + general noun* was used in the case of action taken by the municipalities, previously mentioned in the productions. The relation of co-reference is based on an attribution of this property to the action taken, made implicitly. *Cette mesure, cette pratique, cette modernité, cette solution, cette façon, cette façon de vie, cette méthode, ce phénomène, ce changement* are anaphoras used. Sometimes, this device was used twice:

*En ce qui me concerne, cette pratique n'est pas correcte. Je suis contre ce phénomène.* [As far as I am concerned, this practice is not correct. I am against this phenomenon.]

In most cases, a referent corresponds to a noun or an adjectival phrase. Nevertheless, there are cases of resumptive anaphora where the referent corresponds to a larger segment of the sentence.

Repetition is essential in some cases, but, sometimes, a word hovers around the text without having any objective and the use of a pronominal element or a determiner would be the most appropriate option. An important observation we often made in both levels concerns the iteration of a key word throughout the text. This approach may be related to the fact that pronouns eventually provoke ambiguities in discourse, or the candidates may have chosen a surest route against the risk of using an incorrect pronoun.

*Le musée organise beaucoup d'activités pour les enfants qui vont avoir lieu dans ce musée.* [The museum organizes a lot of activities for children that are going to take place in this museum.]

In the following example, the referent is the same in almost the whole production reducing the possibility of the existence of other referents.

*Je voudrais parler des bienfaits de la musique. On doit aimer la musique. Il y a une organisation qu'on peut faire des activités avec la musique. On doit écouter à la musique parce que la musique est très bonne pour la santé.* [I would like to talk about the benefits of music. We must love music. There is an organization that we can do activities with music. One should listen to music because music is very good for health.]

Although anaphoric elements are used adequately in a text, sometimes, in the same text, the lexical anaphora that is introduced by *ce, cette, ces* is distant from the referent and it might be difficult for the reader to resolve the reference, e.g.:

*Un programme de volontariat est une bonne solution. On proposera une façon contemporaine pour devenir un volontaire qui va participer pour aider les autres personnes. Les volontaires seront aidés par les responsables. On peut donner la chance aux participants de gagner de l'expérience et des savoirs. Ainsi, les volontaires, après leur enseignement, seront capables de travailler dans nombreux domaines d'action intéressants. Cette initiative est...* [A volunteer program is a good solution. We will propose a contemporary way to become a volunteer who will participate to help other people. The volunteers will be helped by the leaders. Participants can be given the chance to gain experience and knowledge. Thus, the volunteers, after their education, will be able to work in many interesting fields of action. This initiative is...]

*Cette initiative* is used here in place of *Un programme de volontariat*. The two noun phrases are separated by four sentences.

Adverbial anaphora was found five times at level B and four times at level C. Regarding on adjectival anaphora, no occurrences were observed at level B but it was found eight times at level C with the structure *tel + noun*. There were also cases of indirect anaphora (Gardelle & Vincent-Durroux 2022). In the following text, there is no referent. The lexical unit *aussi* helps us to understand, after a sequence of complex inferences, that Greece is not the only country where innovation in the domain of sports is welcome:

*Des programmes d'innovation et de motivation sportive doivent exister en Grèce aussi.* [Sports innovation and motivation programs must exist in Greece too.]

## 6. Cataphora

Speaking about the entire sample corpus, cataphoric mechanisms are not abundantly used. Nevertheless, there are interesting cases that attracted our attention. In our corpus, cataphora is either interphrastic or transphrastic (Kęsik 1989 : 36-43). Different cases which show how cataphora is used are shown below:

*Pour son développement personnel, la jeune personne doit acquérir des connaissances nécessaires.* [For his personal development, the young person must acquire the necessary knowledge.]



*Les actions des participants sont nombreuses. Ils peuvent participer en programmes sociaux ou à l'organisation de rencontres.* [The actions of the participants are numerous. They can participate in social programs or in the organization of meetings.]

*Je suis une adepte du premier choix, c'est-à-dire je préfère de rester en classe un peu plus longtemps.* [I am a fan of the first choice, that is to say, I prefer to stay in class a little longer.]

*Les jeunes peuvent aider avec un support qu'ils utilisent au quotidien : l'ordinateur.* [Young people can help with a medium they use daily: the computer.]

In the same way as anaphora, cataphora can be segmental or resumptive. In our sample corpus, we found a few examples of resumptive cataphora. In relation to examples of segmental cataphora, none was found.

It would also be interesting to note the ana-cataphoric use of the pronoun *le* in the following example. *le* replaces *le programme sportif* of the previous sentence and announces the subsequent discourse (Kęsik 1989 : 79).

*J'ai trouvé des renseignements pour le programme sportif. Laissez-moi le présenter. D'abord, à Athènes, il y a des volontaires...* [I found information for the sports programme. Let me introduce it. First, in Athens, there are volunteers...]

*Solution* was used several times in the first written production of level B. In the first two examples, it is used successfully in a cataphor where the explication follows immediately after, and, awkwardly, in the third example, where the sign of equality (=) interferes in the text:

*J'étais triste et j'ai décidé de discuter avec mes parents pour une meilleure solution. On a trouvé un professeur et j'ai commencé des cours.* [I was sad, and I decided to discuss with my parents for a better solution. We found a teacher and I started lessons.]

*Je te donne deux solutions à ton problème : tout d'abord, [...]. Ensuite, [...].* [I give you two solutions to your problem: first, [...]. Next, [...].]

*Ma solution pour ton problème est = il faut faire plus attention en classe.* [My solution for your problem is = you must be more careful in class.]

There is also a case where the same noun is used as a cataphor at the beginning of the text and as a conceptual anaphor at the end of the text:

*Je lis l'e-mail et j'ai les solutions pour ton problème. [...] J'attends ta réponse pour ces solutions.* [I read the email and I have the solutions for your problem. [...] I await your response for these solutions.]

## **7. Conclusions and suggestions for future research**

This paper encompassed the question of the presence of the anaphora and cataphora in a sample corpus composed of texts of the language proficiency levels B and C of the

*Common European Framework*, written by Greek-speaking users/learners of French who participated in National Foreign Language Exam System (Κρατικό Πιστοποιητικό Γλωσσομάθειας, ΚΠΓ).

The findings of this modest sample size study led to the conclusions outlined below:

- a) Anaphora is an essential element in the written production of the candidates, and it accounts for the predominant part of endophora. Cataphoric reference examples were also found in our data but to a lesser extent.
- b) Both pronoun anaphora and lexical anaphora are present in the text. Anaphoras belonging to the nominal category are the most frequent. On the other hand, anaphoras with an adjectival or a verbal referent were not attested in the sample. Reference was also made to the use of noun phrases *ce + noun* and the replacement of the referent by another noun. Faithful and unfaithful anaphora are also used.
- c) It should be noted that the linguistic errors committed by the candidates were not considered in the framework of this study. However, errors regarding the reference were noted because they usually impede the comprehension. It is noteworthy that restructuring of sentences is in some cases considered necessary. The distance between the referent and the anaphora and, also, the context which stands between them may sometimes lead to confusion.
- d) The redundant use of the referent throughout the text is also an observation made. Its replacement by the most appropriate pronoun, or any linguistic element, but also the information relating to the risk of overuse of this element should be considered by the teacher as a challenge.
- e) Regarding the presence of anaphors and cataphors in the sub-corpora of levels B and C, the research revealed no significant differences between them except some cases, e.g. the use of *cela* or the adjectival anaphora). More indications should be necessary to confirm or not that users/learners do not behave differently.

French is a language which disposes a variety of anaphoric devices that they are not always introduced or considered as such during the teaching process. Teachers should identify the characteristics of anaphora and explain the role of all cohesive devices found in texts exploited in the classroom of the foreign language for the enhancing of comprehension skills. Corpora are a precious instrument to provide evidence on text elaboration. They can be used to facilitate learning and to assist learners to reflect on the correct interpretation of relationships among elements.

Writing a cohesive text by connecting ideas in an appropriate way is an important skill for a successful communicative process, but it is not the only one that should be fostered by teachers. It should be noted that proofreading of learners' written productions by themselves is a very important skill that should be tackled with particular care in the classroom of the foreign language. It is an opportunity for them to provide for the quality of their productions and to develop their self-awareness. On

the other hand, teachers should show professional awareness to develop this capacity to learners. They should enable learners to manage their time so that they can have the opportunity to read very carefully their completed texts before submission in order to reveal inconsistencies, ambiguities and lack of clarity. The time devoted to proofreading should be considered as an essential part of the writing procedure and not as a luxury or an unnecessary final step. As it happens in real life, in the professional and social domains, proofreading strategies should be also appreciated and prevalent in the teaching of foreign languages.

Regarding the generalizability of the conclusions in our limited study, it should be noted that the combination of quantitative and qualitative research could probe into the issue we are dealing with and offer reliable results. To achieve a more complete description in the hope that it will illustrate what users/learners can do or cannot do, it would be useful to verify the conclusions drawn here in a large-scale, more representative, dataset compiled from written productions of varying text type or genre and a range of topics treated. Argumentative or narrative strategies keep abreast of the relationships among the different elements in context. Data from users/learners' not having a common mother tongue could also be explored in order to find out if this is a significant factor as regards the use of anaphora. Furthermore, the annotation of anaphoric reference in learners' corpora could be a useful tool for the extraction of statistical data and the exploration of this domain in users/learners' interlanguage. It should also be useful to explore the appropriate use of cohesive ties in written productions having a good evaluation in the other criteria imposed by the evaluation grid of the examination system.

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# What Role Do I Play in My Learning? A Study on the Academic Engagement of Higher-Education Students

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## Abstract

The study of academic engagement has gained international visibility due to various factors operating in the social environment, such as fragmentation, 'liquidity' in interpersonal relations, etc., which end up affecting the persistence rates in studies, or its manifestation in an increasing rate of desertion in higher studies on the part of Argentine students. This research has been carried out within this framework, where 350 students of University and College education, who are enrolled in technical, humanistic-pedagogical and economic studies, completed the Academic Engagement Scale (Daura & Durand, 2018) with the purpose of analyzing, on the one hand, their level of involvement with their studies; and on the other hand, inquiring on the existing connection with demographic variables.

**Keywords:** academic engagement, measuring devices, higher education.

## 1. Introduction

We live in a social context featured by fastness, superficiality, successfulness, seduction, instability, consumerism, the lack of a sense for which to live, and the questioning of ideas (Bauman, 2013)

Faced with this, in the educational field some thinkers, academics, researchers and pedagogues come up, as beacons lightning the road and acting as a gust of air that oxygenates, and they try to give light and provide solutions for improvement to what at first glance seems negative and even destructive.

Among the topics widening the horizon is the academic engagement, a meta-construct which investigation is introduced even with a certain paradox, if we take into account the above-mentioned environment and the meaning of the first term that makes it up. Admittedly, undertaking a commitment entails complying with the word given, being loyal and honest to oneself and to others, taking responsibility for the decisions made. At the same time, the engagement may be personal and collective and, in the school or academic path, it entails assuming a specific role; to this extent, it is colloquially said that a student or an institution are committed when they carry out the tasks concerning them.

To this extent, its study and analysis is valid if it is considered in connection with the serious problem of desertion. It is widely-known that the graduation rate of the Argentine university system is one of the lowest in the region and in the world; out of 100 students being admitted at the public education sector 74 do not graduate; while in the private sector, for the same number of students, 58 do not finish their studies. As regards the further education level, 55% of students who enroll at teacher training centers drop out in the first year of studies, and the graduation rate does not exceed 30% (Centro de Estudios de la Educación Argentina, 2018; Fernández, June 5<sup>th</sup>, 2018; Marcó del Pont, November 7<sup>th</sup>, 2017). Even those who are most critical of the educational and economic policies adopted last year say that more than 19,500 students dropped out of school in the 2017 academic year (Fdel, Jan, 31, 2018).

Within this framework, the present study is made, with the participation of 350 University and Further-Education-Level students who are taking technical, humanistic-pedagogical and economic studies in the province of Buenos Aires and in the Autonomous City of Buenos Aires (CABA), who completed the Academic Engagement Scale (Daura & Durand, 2018) with the purpose of analyzing, on the one hand, their level of involvement with their studies; and on the other hand, investigating the existing connection with demographic variables.

To this end, firstly, after introducing a brief theoretical framework on the main study construct, in which such construct is defined and some of the research devices that were designed to evaluate it are described, the results achieved with the selected sample are discussed in detail.

## **2. Theoretical Framework of Reference**

### **What is the academic engagement?**

Involvement, responsibility, mission, agreement, treaty, are synonyms used to refer to the commitment. If we delve into its etymological root, it comes from the Latin term *compromissum*, which has two prefixes. The first, 'com', comes from the Greek *koinos*,

which means common, joint; while the second, *promissus*, means promise. Thus, the term, in its affirmative and positive meaning, is "an undertaken obligation; [a] given word" (Real Academia Española, 2018, w.p.) it can also be considered as a joint promise made between two parties.

The commitment is also connected to the academic field, from the translation of the construct that in English is called academic engagement, which began to be studied in the Anglo-Saxon environment as a turn or change of focus on research regarding desertion and student retention.

Its meaning already states the interaction unfolding between two parties which are supposed to undertake a responsibility facing the decision making process and the resulting actions. In connection with the school or academic environment, the main characters in this interrelation are the learner and the educational institution, represented by the heads, teachers, tutors and other members of the institution.

It is precisely in this inter-play that one of the theoretical models used as a reference to explain the construct is anticipated. Specifically, the socio-cognitive theory, in which both the student and the educational organization are considered to have a leading role in the learning process and in the connection established between them.

Although there are many definitions of academic engagement, in this model it is understood as the process where the students and the teaching institution are involved, in which the former invest time and energy to carry out academic activities, and the latter strives to implement effective educational practices (Kuh, Cruce, Shoup & Kinziey Gonyea, 2008). From this approach, the cognitive, affective-motivational and behavioral factors that intervene in the academic commitment are taken into account, which constitutes one of the most in-depth models for understanding the construct.

Fredericks, Blumenfeld and Paris (2004) specify the peculiarities of these three variables from the description of how they are seen in students (Table 1).

Table 1.

Characteristics of the variables that make up the academic engagement

	Variable	Manner in which it shows in students
Academic engagement	Behavioral Engagement	Compliance with rules of co-existence established in the classroom and in the institution in general: Paying attention, participation,

	respectful acceptance of other people's ideas and effort regulation
Emotional engagement	Intrinsic motivation Extrinsic motivation Task appreciation Anxiety regulation Regulation of other negative emotions
Cognitive Engagement	Thought elaboration Meta-cognition Critical or reflexive thinking Organization

Source: own elaboration from Fredericks, Blumenfeld and Paris (2004)

This model offers a very comprehensive vision of the construct, which allows us to approach it in an overall manner and to offer a better support to the student, as well as to the teachers or to each educational institution in order to promote it.

However, since it is a concept crossed by multiple variables that give a higher level of complexity to its approach, it is necessary to consider how to measure it in order to obtain the information necessary to assess it objectively.

### **How to assess the academic engagement? Some instruments designed...**

Fredricks and McColskey (2012) and Veiga, Reeve, Wentzel & Robu (2014) thoroughly describe the tools used to deepen the study of academic engagement. These include self-report scales, grading scales, interviews, and class observations. Although all of them offer advantages and disadvantages, generally speaking, Likert scales are the most frequently used because they allow us to obtain information that is not directly noticeable, and that refer to the students' perception of the object of study.

Many of the existing surveys explore the three variables recognized in the socio-cognitive model, while others focus on two or only one aspect. In addition, some surveys designed for the secondary education level are highlighted, such as the School Engagement Measure (SEM) (Fredricks, Blumenfeld, Friedel & Paris, 2005). Others apply only at university and postgraduate levels: the Motivation and Engagement Scale (MES) (Lifelong Achievement Group, 2013), the Academic Involvement Questionnaire (QEA) (Abello Riquelme, Díaz Mujica, Pérez Villalobos, Almeida, Lagos Herrera, González Puentes & Strickland, 2012), the Questionnaire of Academic Experiences (QVA) (Almeida, Ferreira & Soares, 1999), the Survey of Well-being in an Academic Context (UWES-S) (Schaufeli & Bakker, 2004).



At the same time, the importance given to the study of the construct had an impact on the implementation of programs aimed at obtaining unbiased information on the involvement of students in different countries, the results of which are used to make improvements in the education system. Within the context of these programs, the following research instruments were designed and are still being implemented: the National Survey of Student Engagement (NSSE) (Indiana University School of Education, 2016), which is applied in university institutions in the United States and Canada; the Australian Scale on Student Engagement (Australian Council for Educational Research, 2016, which is used in the southwestern region of Oceania; and the scales for undergraduate and graduate students in Great Britain and Northern Ireland (Higher Education Academy, 2015a; Higher Education Academy, 2015b).

### **3.Methodology and Procedures**

#### **3.1.Sample**

A sample of 350 first-year college and university students was made.

An exploratory and descriptive investigation was carried out because the variables to be analyzed were observed as they happened in their natural context at a given moment.

#### **3.2.Purposes**

- Analyze the level of academic engagement of students in university and college education.
- Examine the existing connection between academic engagement and various socio-demographic variables, especially, gender, type of institution and type of studies.

#### **3.3. Instruments**

##### **Socio-demographic Questionnaire**

A questionnaire was designed to collect information regarding the gender, age, institution and studies of the subjects who took part in the study.

##### **Academic Engagement Scale**

It is an instrument designed and validated in previous studies (Daura & Durand, 2018; Daura, in press) in accordance with the approaches of the socio-cognitive theory (Fredricks & McColskey, 2012; Trowler, 2010); it has a Likert scale format and is made of 56 items, with five answer options ("0", which means "completely wrong", "1" "wrong", "2" "neither true nor wrong", "3" "true" and "4" "completely true").

The instrument is divided into three sections, which, in turn, are made of 13 variables that are defined and distributed as described in the following table (table 2).

Table 2. Description of the 13 extracted variables

Section 1. Motivational Engagement: made of 17 items, it studies four motivational affective components	
Task Assessment	It shows the usefulness, the importance and value given to the contents, and to the learning activities given in the institution.
Intrinsic Motivation	It shows the interest in learning the contents and/or bibliographic material suggested by the institution.
Extrinsic Motivation	It shows an interest in studying in order to satisfy external motivations (such as getting good grades, obtaining recognition from others), and to learn on the basis of the guide provided by the context
Anxiety	It shows the anxiety felt in stressful situations of academic life, such as an examination.
Section 2. Cognitive Engagement: made of 27 items that study the cognitive strategies used to learn, by means of the following variables:	
Deep Strategies	It shows the extent to which elaboration strategies are used and the extent to which prior knowledge is used in order to solve problems, make decisions, conduct critical assessments, and accept the opinions from others.
Basic Strategies	It shows the extent to which review strategies are used to learn to re-read class notes, memorize Keywords or concepts).
Organization	It shows the ability to select and organize the important concepts of the studying material.
Extrinsic Regulation	It shows the strategies applied by the subject when adjusting to the indications made by the teacher.
Management of Time and Effort	It indicates both the personal willingness to strive for academic work, even when difficult, and the ability to organize the time needed to study
Team Work	It shows the willingness to work and learn as a team in the institutional environment.
Section 3. Contextual Engagement: made of 12 items that assess the actions the institution carries out in order to support the student and promote his/ her academic involvement, as well as the participation of the latter in the activities proposed by the institution and his/ her identification with the moral standards fostered by the educational institution. Such items are distributed in the following variables:	
Positive Assessment of the Institution	It indicates the extent to which the student appreciates various actions that are carried out on the part of the institution to promote different skills and encourage integration among students.

Teaching and Tutorship	and	It shows the extent to which the actions carried out by tutors and teachers are appreciated in order to facilitate students' learning and encourage their participation in the institution.
Feelings of belonging	of	It assesses the feelings of belonging that the student has and that are promoted by the institution by means of various academic activities.

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Source: Daura and Durand (2018)

### **3.4.Procedure**

The appropriate permission was requested from the authorities of the institutions taking part in the study; likewise, the students who completed the questionnaires were provided with information about the purposes of the work, the confidential and voluntary nature of their participation, and were given a document which they signed giving their consent.

The time taken to complete the instruments ranged from 40 to 60 minutes.

The scores of the Academic Engagement Scale were obtained by adding the subjects' choices and converting the figure to scale 10.

The data was processed using the program SPSS -Statistical Package for the Social Sciences - version 23.0.

## **4.Analysis of Results**

### **4.1. Descriptive Statistics of the Academic Engagement Scale**

A descriptive analysis was made (minimum score, maximum score, population average and standard deviation) of the scores obtained by the students in the Academic Engagement Scale.

Table 3 shows the scores achieved in the Motivational Engagement section, among which the average of the variables Task Assessment and Intrinsic Motivation stand out, which would make them capable of assessing the contents and learning activities proposed by the institution, and of showing an interest in acquiring new knowledge.

At the same time, the students show a high level of anxiety, an effect that could be connected with the initial moment of the studies in which they currently are, a situation that usually generates uncertainty, and the need to adapt to a new, demanding and unknown environment.

Table 3  
Description of the Motivational Engagement section

Variables of the Motivational Engagement section	Students	Minimum Score	Maximum Score	Average	DS
Assessment of the task	150	2,81	10,00	7,40	1,42
Intrinsic Motivation	150	1,88	10,00	6,92	1,81
Extrinsic Motivation	150	0,00	10,00	6,05	2,00
Anxiety	150	0,00	10,00	5,03	2,18

Source: own compilation

As for the descriptive statistics in the Cognitive Engagement section (table 4), the students stand out in the Organization variable, which would make them capable of selecting and organizing the important ideas of the contents learnt; and in the Extrinsic Regulation section, which would lead them to follow the guidelines and suggestions offered by the teachers, an issue connected both with the moment of their studies in which they currently are, where they would need to rely more on the experience of other people more skilled to guide their learning, as well as their autonomy and the achievement of good academic results. In fact, previous studies show how the students who are more adjusted and committed to their learning tend to rely more on their environment, to seek help from other people and to make all the necessary enquiries with sharpness and sagacity (Donolo; Chiecher, Paolini & Rinaduo, 2008; Fernández Jacquez, 2015; Fredricks; Blumenfeld; Friedel & Paris, 2005; Pintrich, Smith, García & Mc Keachie, 1991; Zimmerman & Schunk, 1989).

Table 4  
Description of the Cognitive Engagement section

Variables of the Cognitive Engagement section	Students	Minimum Score	Maximum Score	Average	DS
Deep Strategies	150	1,25	10,00	6,25	1,54
Basic Strategies	150	0,00	10,00	4,41	2,31
Organization	150	0,63	10,00	7,20	1,80
Extrinsic Regulation	150	0,00	10,00	6,59	1,69

Management of time and effort	150	0,50	10,00	5,73	1,8 6
Team work	150	0,83	10,00	6,10	1,7 4

Source: own compilation

As regards the descriptive statistics in the Contextual Engagement section (table 5), the average scores obtained in the variables, Positive Assessment of the Institution and Feelings of Belonging stand out, which show that students appreciate the actions carried out by the institution of which they are part of, in order to include them, which leads them to express greater interest in participating in the proposed activities and to feel part of it. These effects are linked to the "contextual model of academic engagement" of Lam, Wong, Yang and Liu (2012), in which it is argued that, as students increase their commitment to the institution, they develop more positive feelings towards it, towards the people with whom they interact (classmates, teachers, family members) and towards their own studying ability.

Table 5

Description of the Contextual Engagement section

Variables of the Contextual Engagement section	Students	Minimum Score	Maximum Score	Average	DS
Positive Assessment of the Institution	150	1,25	10,00	6,98	1,7 4
Teaching and Tutorship	150	0,00	10,00	4,57	2,1 8
Feelings of belonging	150	0,63	10,00	5,42	1,7 0

Source: own compilation.

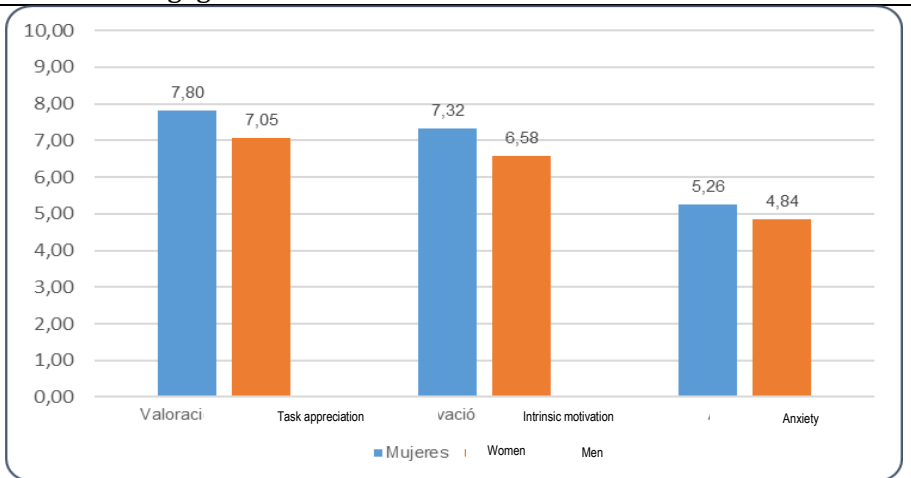
In order to analyze to which extent the academic engagement can be explained by various socio-demographic aspects, subsequent analyses of variances (ANOVA one way) were made, in which, as dependent variables, the average scores reached by the sample in the variables of the Academic Engagement Scale were taken into account and, as an independent factor, gender, institutional level and type of studies were considered.

#### 4.2. Comparison of the sections of the Academic Engagement Scale according to gender

Regarding the gender of the subjects who took part in the study, as a result of the variables analysis made, we notice that in the motivational section (Figure 1) significant differences were found for the women in the Task assessment ( $F = 25,927$ ,  $p < 0,001$ ) and Intrinsic motivation variables ( $F = 14,979$ ,  $p < 0,001$ ); on the other

hand, they scored less favorably on the anxiety variable ( $F = 3.168, p < 0.076$ ), which is close to statistically significant figures. These effects, in addition to agreeing with those reached in previous studies (Parada Contreras & Pérez Villalobos, 2014; Parra & Pérez, 2010; among others), respond to the unique profile of women, which is evidenced by greater responsibility, interest in the studies, dedication and effort to achieve academic goals and the involvement in the institutional context to which they belong.

Figure 1.  
Differences between men and women in the motivational section of the Academic Engagement Scale

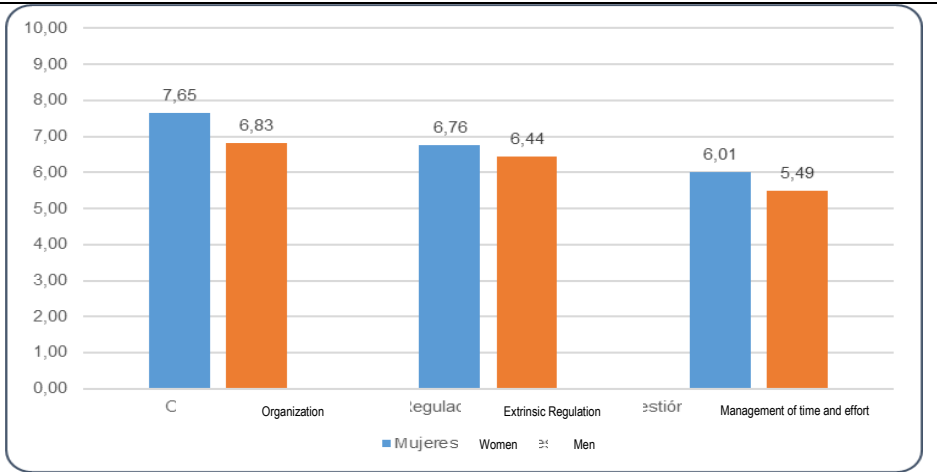


Source: own compilation

In connection with the cognitive engagement section, women also outperform men in the Organization ( $F = 19,084, p < 0,001$ ) and Time and Effort Management variables ( $F = 7,0469, p < 0,008$ ). In the Extrinsic Regulation variable, although differences close to statistical values were found, women also benefited (Figure 2).

These effects reinforce the results reported in the motivational engagement section, and evidence the ability of students to organize new knowledge, manage the time and effort needed to study, and the need to rely on instructions and suggestions from other experts (such as teachers) in order to implement learning activities. The latter may also be supported by the increased anxiety shown by women.

Figure 2.  
Differences between men and women in the cognitive engagement section of the Academic Engagement Scale

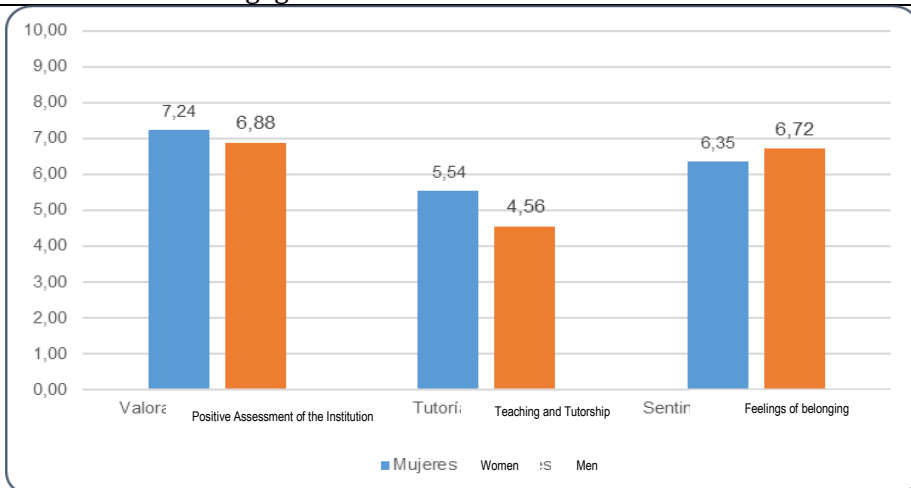


Source: own compilation

Finally, in the Contextual Engagement section, women, compared to men, also achieved better scores in the Appreciation of the Institution ( $F = 4.0189, p < 0.046$ ), Tutoring and Teaching ( $F = 15.062, p < 0.001$ ), and Feelings of Belonging variables ( $F = 3.6118, p < 0.058$ ), which could be an indication of how involved they are with the institution where they are studying (Figure 3).

Figure 3.

Differences between men and women in the contextual engagement section of the Academic Engagement Scale.



Source: own compilation

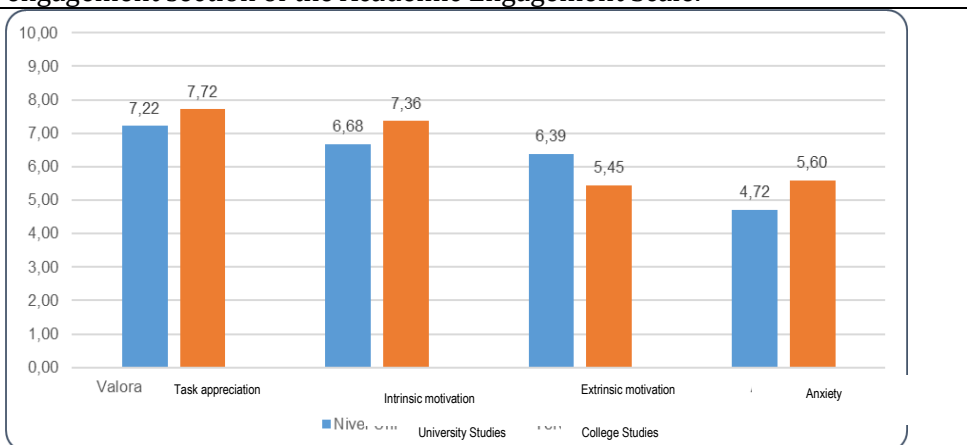
### 4.3. Comparison of the sections of the Academic Engagement Scale in terms of the institution of belonging.

The same analysis was made in order to confirm whether there are statistically significant differences in the scale of engagement based on the institution of belonging. To this extent, the sample was divided into two subgroups: University Level, made up of 225 students enrolled in university studies; and College Level, made up of 125 students enrolled in studies conducted by Teacher Training Institutes.

In the motivational engagement section (Figure 4) we noticed some interesting results that benefit college level students in the Task Assessment ( $F = 10,120, p < 0,002$ ) and Intrinsic Motivation variables ( $F = 11,833, p < 0,001$ ); and university level students in Extrinsic Motivation ( $F = 18,443, p < 0,001$ ) and Anxiety variables ( $F = 4,523, p < 0,001$ ). These effects could indicate the presence of two types of motivational engagement profiles which, in the case of students undergoing college studies, could be deeper and could be evidenced by the appreciation of the contents and activities offered by teachers and tutors, as well as by the interest in acquiring new knowledge. On the other hand, in university students, the motivational engagement could be superficial, insofar as it would be directed towards acquiring new knowledge to satisfy external motivations, without worrying too much about the repercussions that this might have.

These results are consistent with other factors that are not analyzed here, such as, for example, the socio-economic level of the sample that took part in the study or the place of residence and proximity to the institution in which the studies are taken.

Figure 4.  
Differences between university and college students in the motivational engagement section of the Academic Engagement Scale.

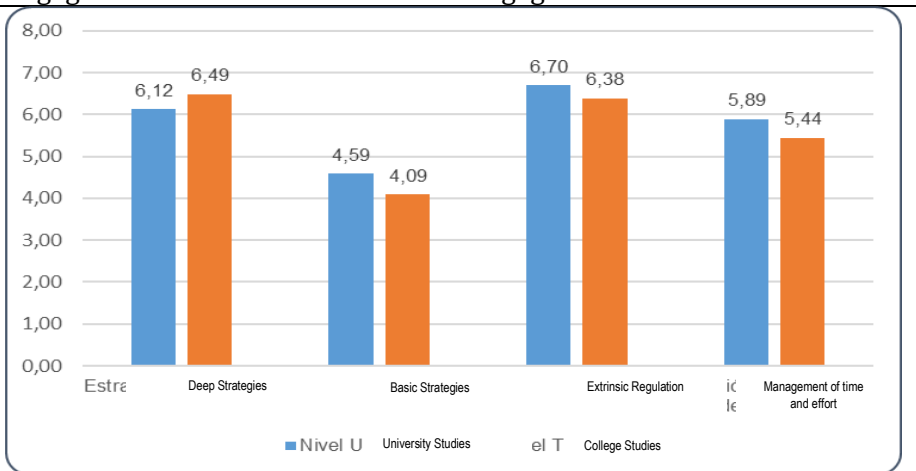


Source: own compilation



In the cognitive engagement section (Figure 5), college students were favored in the use of Deep Strategies ( $F = 4.523, p < 0.034$ ); while university students had a greater command of Basic Strategies ( $F = 3,823, p < 0,051$ ), Extrinsic Regulation ( $F = 2,902, p < 0,089$ ) and Time and Effort Management ( $F = 4,676, p < 0,031$ ). These effects show that, while college students could have a greater ability to think reflexively and critically, make decisions, and accept the opinions of others, the performance of the commitment in this regard could be undermined by the failure to take advantage of the guidance provided by teachers or other experts, as well as by a reduced willingness to make the effort and organize the time needed to study; one might even think of these effects as a result of the influence of the institutional context, which in the case of these students offered less personal support.

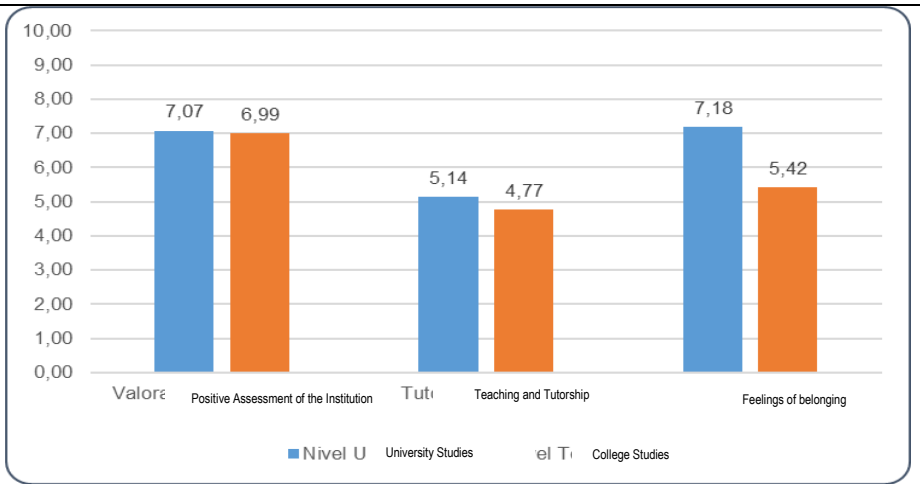
Figure 5.  
Differences between university and college students in the cognitive engagement section of the Academic Engagement Scale.



Source: own compilation

The last idea pointed out is based on the results obtained in the Institutional Engagement section (Figure 6) in which, although statistically significant differences were only reached in the Feelings of Belonging variable, in favor of university level students ( $F = 94,312, p < 0,001$ ), the scores obtained in Positive Assessment of the Institution and in Tutoring and teaching also benefitted this group of students.

Figure 6.  
Differences between university and college students in the contextual engagement section of the Academic Engagement Scale.



Source: own compilation

#### 4.4. Comparison of the sections of the Academic Engagement Scale according to the type of studies.

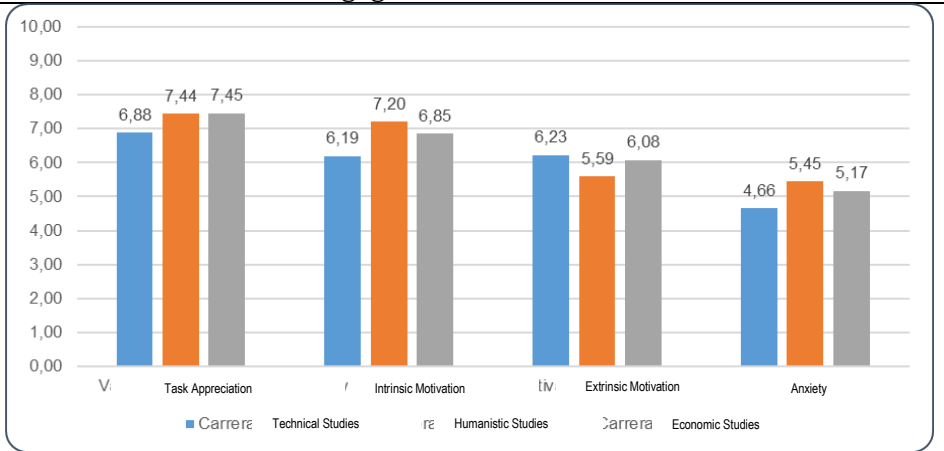
A new analysis of variances was made to confirm whether there are differences in the variables that make up the Academic Engagement Scale depending on the studies. For this purpose, the students sample was organized into three types of studies, in which case the supporting epistemic area was considered:

- Technical studies: 100 students enrolled in Industrial Engineering and Computer Engineering were recruited here.
- Humanistic-pedagogical studies: a group made up of 78 students who were enrolled in Psychology, bachelor studies in Psychopedagogy, History, Higher Education and Primary Education.
- Degrees in Economics: in which 111 students studied Bachelor of Business Administration, Bachelor of Agribusiness, Public Accountancy and Professorship in Economics.

In connection with motivational engagement, in the Task Assessment variable, the scores achieved benefit students who take Humanistic and Economic studies ( $F = 5,538, p < 0,004$ ) ( $X = 7,44$  and  $X = 7,45$ , respectively). Likewise, Humanistic students also obtained the highest score in Intrinsic Motivation ( $F = 8,001, p < 0,001$ ) and in Anxiety ( $F = 3,326, p < 0,037$ ); the latter effect does not benefit them and may be strongly influenced owing to the fact that the group is made up of a greater proportion of women.

Figure 7.

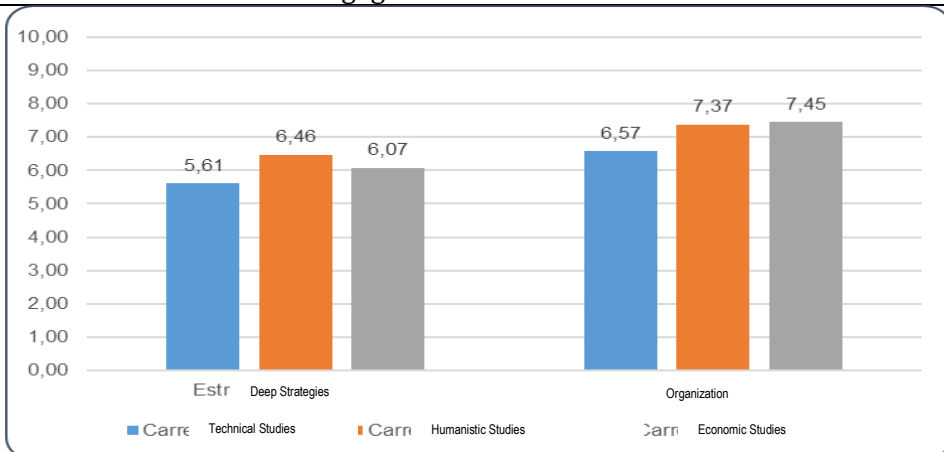
### Differences according to the type of studies in the motivational engagement section of the Academic Engagement Scale



Source: own compilation

In the cognitive engagement section (graphic 8), students of humanistic programs outperformed others in the deep Strategies variables ( $F = 8,132, p < 0,001$ ); these same students, along with those of Economic Studies, also reached the highest score in the Organization variables ( $F = 7,924, p < 0,001$ ), proving to be more efficient in carrying out critical and reflexive reasoning, as well as incorporating new knowledge with the previously learned one.

Figure 8.  
Differences according to the type of studies in the cognitive engagement section of the Academic Engagement Scale

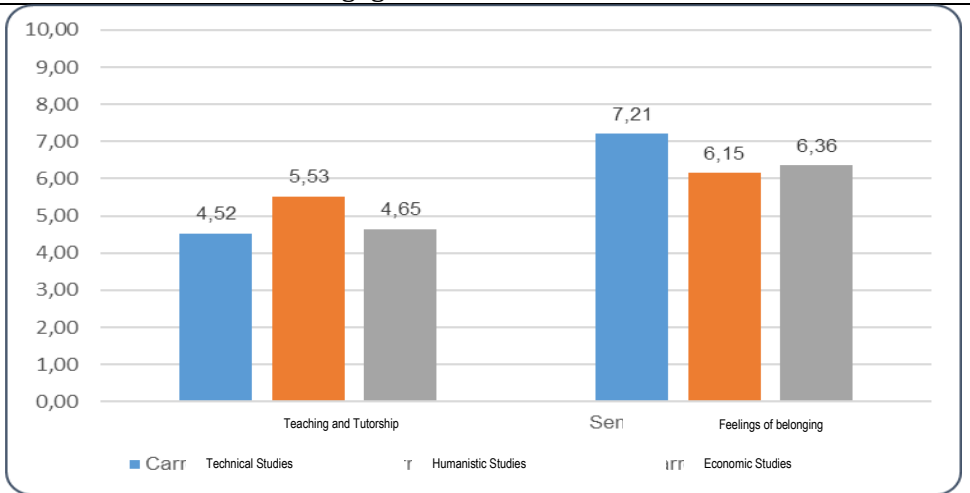


Source: own compilation

Finally, in the contextual engagement section (Figure 9), those who stated to have a greater connection with teachers and tutors are the students of Humanistic Studies,

an effect which may be influenced by the fact of an affinity as regards the inherent duties of the future professional' role. ( $F = 4,912$   $p < 0,008$ ), or with the interest in learning from other people who are more expert. On the other hand, students of Technical Education were ahead of others in the Feelings of Belonging variable ( $F = 9,807$ ,  $p < 0,001$ ).

Figure 9.  
Differences according to the type of studies in the contextual engagement section of the Academic Engagement Scale



Source: own compilation

## Conclusion

We believe that academic engagement implies the fulfillment of a promise made by two parties involved in the educational process: the student and the institution to which he or she belongs. The promise at issue concerns an academic goal that binds and connects these parties even closer, and that is related to starting and completing studies as successfully as possible. The scope of this goal implies challenges for both parties, which may be properly faced as long as dialogue and interaction are fluid and encourage mutual knowledge. On this basis, the study of academic engagement surpasses the approach of desertion and student retention, which concepts preceded it, and with which it shares some common questions, on the one hand, what are the reasons that influence students to drop their studies?, and on the other hand, what are the variables that encourage students to remain in the institution where they are studying?

We reassert that academic engagement has a unique focus in as much as it is based on interaction, on the participation that takes place between the student and the institutional parties, and is therefore process-based. It is not focused on identifying the consequences of the resulting failure - dropout of studies - or on the factors that help retaining the student, but on strengthening that relationship. This view makes the construct have an approach that, besides being preventive, is more customized; this idea supports, on one hand, the assertions made by Fredricks, Blumenfeld, Friedel and Paris (2005) regarding the existing relationship between academic engagement and self-regulated learning, and on the other hand, the assertion made in previous works on the "co-regulated customized spiral of learning" (Daura, 2013a, 2013b, 2017), a theoretical model which explains that at higher levels of support and advice provided by teachers, students improve the motivational and cognitive strategies they use in order to learn.

In accordance with these assumptions, this paper examines the results of a research conducted on 350 students of university and college education in Buenos Aires City and Buenos Aires Province, in order to measure their levels of academic engagement and connect these results with various socio-demographic variables. To this end, a questionnaire was administered in order to obtain information on gender, studies, and educational institution; as well as the Academic Engagement Scale (Daura and Durand, 2018).

As a result of the subsequent analysis, it was observed that the students who took part in the study, at the motivational engagement level, stand out for having a greater appreciation of the learning contents and the interest in grasping these contents. At the cognitive level, they stand out for organizing new knowledge and tending to follow the guidance offered by teachers; finally, at the contextual engagement level, for appreciating the institutions they are part of, and for having a feeling of belonging to them.

In this regard, the results obtained, although very positive, indicate the need to guide students so that they may develop a higher level of regulation of anxiety; and that they may make a greater use of deep thinking strategies as well as time management strategies to study. In addition, at the institutional level, tutorial strategies or academic counseling oriented to guide students' learning and favor their participation in the institution should be improved.

Connecting these results to demographic data shows that women have higher levels of motivational engagement; a greater cognitive engagement in the Organization, Extrinsic Regulation and Time and Effort Management variables; and a greater contextual engagement. These effects could be associated with previous studies on

self-regulation and academic success, which evidence that women tend to show higher levels of performance (Meza Cano, de la Rosa Gómez, Rivera Baños & González Santiago, 2018; Ndirangu, Muola, Kithuka & Nassiuma, 2009; Suarez Riveiro, Ayana Nieto & Gómez Veiga, 2016; Vrugt & Oort, 2008; just to mention a few).

On the other hand, College students stand out for achieving better scores in all motivational variables; an effect that was reversed in cognitive variables, where they only reached the highest score in Deep Strategies and in contextual variables. Although it would be convenient to go deeper into the influence of age on these results, it is possible to assume that the higher levels of motivational engagement of students in college institutions will be associated with vocational variables. Indeed, the studies pursued by these students have a pedagogical orientation that is strongly related to both service and the desire to guide others to develop their full potential.

A similar result was observed when comparing the sections of the scale of academic engagement by type of studies, in which analysis the students of Humanistic Sciences were benefited both in motivational engagement and in two important variables of cognitive engagement, as well as in the Tutoring and Teaching variable in the contextual engagement section.

According to these results, it would be convenient, in future researches, to delve into the incidence of age in the development of academic engagement, on the existing differences between studies with pedagogical and humanistic orientation in connection with students' involvement. Likewise, it would be beneficial to compare these results with qualitative information obtained through interviews, focus groups, and life experiences, through which the subjectivity of the parties involved could be examined in greater depth.

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# Epistemological Beliefs of NNEST's based on the NEST-NNEST Dichotomy

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## Abstract

The purpose of this study was to understand graduate and post-graduate EFL teachers' epistemological beliefs based on the standardized English language and their beliefs on the NEST/NNEST dichotomy. In order to gain a deeper understanding two different group of teachers were formed consisting of graduate and post-graduate level of education. The aim was to understand whether or not the level of education affect EFL teachers' beliefs based on the knowledge concept of standardized English and native speakerism. As a data collection methodology for this mixed methods research design, metaphors and the epistemological belief questionnaire (adapted from Hofer, 2000) were used. The results show that there was a significant difference between the two groups' epistemological beliefs. While the post-graduate group was more critical about the issue, the graduate group of teachers seemed to highly accept the standardized language concept. The analysis of the metaphorical conceptions also supported the findings of the questionnaires.

**Keywords:** Epistemological beliefs, Epistemological belief questionnaire, metaphors, NEST/NNEST dichotomy, mixed-method design.

## Introduction

The study of individuals' epistemology, in other words, their beliefs about the nature of intelligence, knowledge, and learning, has received much attention by researchers (Mori, 1999). Epistemological beliefs are generally regarded as beliefs about the nature of knowledge and knowing (Hofer, 2016). Questions such as "what is the source of knowledge? How do we justify it? Is there only one fixed type of knowledge" are examples of the beliefs we construct about knowledge. As Schommer (1994) states, the implicit beliefs about the nature of knowledge and learning, or epistemological beliefs, can affect reasoning, learning, and decision making which results in carrying great importance in educational sciences. Epistemological beliefs in teacher education is also regarded to be important since teachers implicit beliefs about knowledge can actually shape the way they view their subject area of teaching and the way they teach. When focusing on English language teachers, we come to the

fact that the content knowledge, which is also their medium of instruction, is the English language itself. This has brought some controversial issues in the field such as the distinction between native and non-native English speaking teachers (NEST-NNEST dichotomy). Research has shown that these power-related issues in the field have dramatic effects on English language teachers' beliefs about their professional-selves. The fact that their necessary content knowledge represents native English speakers' ethnicity, culture and history, can create controversial issues such as language ownership and the feeling of inferiority in the profession. However, due to global spread of English, the standardization of the language is open to discussion together with the ownership of it.

### **1. Epistemological Belief**

As Hofer and Pintrich (1997) suggest, epistemology is an area of philosophy which deals with the nature and justification of human knowledge. In other words, it is concerned about how people come to know, the theories and beliefs about knowing, and the fact that these epistemological issues are an influence on thinking and reasoning which are cognitive processing. According to Hofer (2001), the study of personal epistemologies can be divided into two sub-sections which the first is related to the stages of psychological development of personal epistemologies and the second focuses on the study of beliefs based on the nature of knowledge and knowing. As Schommer (1994) states, epistemic literature can have varying focuses, however, in terms of cognitive research, studies generally focus on individuals beliefs about the degree of which information is true, the organization of information, the acquisition of knowledge, and the justification of knowledge. Hence, it can be claimed that epistemological beliefs are basically the beliefs about the nature of knowledge and knowing (Conley et. al., 2004).

As Hofer. (2016) states, the investigation carried out by Schommer (1990) which focused on independently developing epistemic dimensions, opened a new era in epistemic cognition research. Schommer (1990) proposed 5 continuous dimensions of epistemological beliefs. These were; stability (fixed- tentative/evolving), structure (isolated-integrated), source (authority-observation and reason), speed of acquisition (fast-gradual), and control of acquisition (fixed at birth-lifelong improvement). In response to Schommer's (1990) study, Hofer and Pintrich (1997) divided personal epistemological theories into two dimensions; the nature of knowledge (how one defines knowledge) and the nature of knowing (how one comes to know). They define the nature of knowledge in two sub-dimensions which are the certainty of knowledge (the continuum goes from viewing knowledge as absolute, fixed, and unchanging to viewing knowledge as tentative and evolving) and simplicity of knowledge (the continuum goes from viewing knowledge as isolated facts to viewing knowledge as interrelated concepts). As for the beliefs about the nature of knowing, they also propose two sub-dimensions, which are; the source of knowledge (from perceiving knowledge which resides in an external authority to active

construction of knowledge through social interaction) and justification of knowledge (from justifying knowledge through by observation and authority to the evaluation of different sources of evidence). Hofer and Pintrich (1997) state that the continuum in each of these reflections illustrate the beliefs which range from being naïve to more sophisticated beliefs. However, as cited in Brownlee et. al. (2017), Bromme and colleagues suggested that such relations might be context sensitive. Perry (1970), who was regarded to be one of the pioneers to attract attention to epistemological cognition (cited in Schommen, 1994), developed adult epistemological development framework in which he found that some of the most naïve students who entered Harvard University with a dualistic view of the world in which they believed in black or white knowledge that is handed down by authority (cited in Schommer 1994). As students came across different viewpoints in their classes they began to gradually be aware of multiple views and by the senior year many students became more open to change in their beliefs.

As Lunn Brownlee et. al. (2017) state, recently, researchers have focused on how teachers' epistemic cognition can give insight into their professional development and their teaching practice (e.g., Lunn Brownlee, Schraw, & Berthelsen, 2011; Lunn Brownlee, Schraw, Walker, & Ryan, 2016). Buehl and Fives (2009) have found in their study that student teachers epistemic cognition can significantly affect their teaching approaches and techniques, and their expectations from their students. For instance, they found that student teachers who have a teaching knowledge as open to amendment can pay greater attention to new teaching methods and techniques. Beliefs about their source of knowledge is also stated to affect how individuals seek out information, which can be from professional journals, colleagues, one's own creativity etc. Yadav et. al. (2011) have also focused on how student teachers' epistemic beliefs was important for teacher preparation. They state that the student teachers epistemic beliefs shape the knowledge they gain from their observations of other teachers and their own teaching goals. They further indicate in their study that the teachers' epistemological beliefs reflect their own approaches to learning. Kang (2008) focused on how pre-service science teachers viewed science knowledge. While some regarded it as consisting of facts, hence, aimed in teaching the students these scientific knowledge, others viewed science knowledge as evolving in nature in which these type of teachers were more enthusiastic in having students to develop creative thinking skills. Similarly, in Braten and Ferguson (2015)'s study, which focused on the relationship between different knowledge sources of epistemic cognition and motivation of pre-service teachers, found that student teachers who trusted course books and teacher educators as resources were motivated while gaining knowledge from these sources, whereas, student teachers with sources of teaching knowledge, were more motivated when they gained new knowledge from teaching practice and other student and teachers.

## 2. NEST-NNEST Dichotomy

Kachru (1976) divided the English speaking world into 3 concentric cycles, which are the inner-circle English speaking countries (represents the historical and sociolinguistic bases of English in the regions where it originated such as England), the outer-circle English speaking countries (former colonies of the UK and USA such as India, Kenya, Nigeria, Singapore etc.) and expanding-circle countries (countries that gradually came under western influence and where English is spoken as a foreign language rather than a second). This distinction between the English speaking countries ignited the distinction between native and non-native teachers' of English. Being a native speaker is generally seen as a rigid category in which transition is implicitly implied to be impossible. As Llorca (2015) states, since the communicative language teaching became as the dominant theoretical framework in language teaching, it was implicitly implied that the native speakers were the one and only source of natural, spontaneous and authentic source of knowledge. It became clear that the native speakers in the field were regarded to be more prestigious. Cook (2007) mentions about how students are judged about how close they resemble native speakers in terms of their competency, proficiency and their knowledge about the language. This is a clear indication of the belief that the native teacher was the ideal type of teacher in the field regardless of their pedagogical competences. Medges (1994) also focused in her study how this power-related status issues created the existence of generic inferiority complex among NNEST's. This was rather tragic since this type of belief had a negative impact on non-native teachers' professional self-esteems (Llorca, 2015). Medges (1992, 1994) was also the first academic to bring up the issue of native speakerism and invoked people to question who was worth more as a language teacher; the native or the non-native speaker. This was regarded to be the first spark in the field to create awareness to the issue. Cook (2005) also mentions in his study that concepts such as English as an International Language (EIL) and English as a Lingua Franca has created certain awareness in individuals regarding that a truly international language cannot be owned by any group of speakers. Similarly, Widdowson (1994) has rejections in which he states that the authority to claim right over a standard version of a global language is not a right of the native speaker since they are also diverse in themselves. He further claims that language is a dynamic system which evolves and adapts in time and in accordance with the context, hence such an existence cannot be viewed as a standard system which is legitimized to only a group of culture, especially if this is a world language. From a different point of view, Graddol (2006) mentioned in his study about the status of English in the world. He further emphasizes that English speakers of other countries far exceed the number of native speakers in the world, hence native speakers are starting to end up as a minority group of speakers. This dramatic change of the language use naturally brings different varieties of the language which has also given the generation of the "world Englishes" term (Kachru, 1992). Hence the standard English and its necessity and the view of the native English speaking teacher as the

ultimate source of knowledge in the field of English language teaching has come to critical questioning and criticism. However, on the other side of the coin, research done by certain scholars such as Jenkins (2007), Sifakis and Sougari (2005), Varghese et. al. (2005), Rajagopalan (2005), Lllurda and Huguet (2003) show relevant finding similar to what Lllurda (2015) likens to the Stockholm Syndrome- even though non-native speakers suffer from discrimination by native speakers who are preferred in many professional situations they justified this situation as being in favor of the native speaker as the ultimate goal for their students.

### **3. Purpose of the Study**

As Hofer (2001) states, there is a growing interest in understanding teachers' epistemological beliefs. However, Hofer and Pintrich (1997) state that further research should be carried out to understand the relationship between epistemological beliefs and its relation to other domains in specific fields. In terms of the nature and the source of knowledge, a gap in the literature has been noticed to understand the epistemological beliefs of English language teachers based on their content knowledge. A major reason for why their content knowledge was emphasized in the study is due to the reason that their nature of knowledge in their profession is a sensitive issue regarding the correct/standard form of their content knowledge; "the English language". The reason for this is based on the fact of globalization which has led to different varieties of English in the world. These new varieties has also created "native speakerism" which favors the NEST's and causes a sense of inferiority among the non-NEST's. Hence, this study aims to investigate non-native English speaking teachers' epistemological beliefs and its relationship to how they view native and non-native English language teachers. It further aims to elaborate how graduate and postgraduate level of EFL teachers' beliefs may differ on the relevant issue. For further elaboration the following research questions are aimed to be investigated.

What do the metaphors of the graduate level EFL teachers reveal about their beliefs based on NEST's-NNEST's?

What do the metaphors of the postgraduate level EFL teachers reveal about their beliefs based on NEST's-NNEST's?

What is the relationship of the epistemological beliefs of the two groups and their beliefs reflected in their metaphors?

## **Methodology**

### **1. Research Design**

A mixed-method design has been adopted in this research. As Cresswell (2013) states, mixed-method research aims to combine both qualitative and quantitative research techniques to broaden the understanding of the subject being investigated. While designing a mixed-method research, Cresswell (2013) states that there are four

aspects to consider before deciding on a mixed method type of study. These are timing (considering the time of the qualitative and quantitative data- whether it will be sequential or concurrent), the weighting (the priority is given to qualitative and quantitative data), mixing (defining how the mixing of qualitative and quantitative data occurs- which phase of the research does it occur?) and theorizing (does a theoretical perspective guide the design?). When taking into consideration these aspects of mixed-method design, this research adopts a concurrent triangulation strategy in which both qualitative and quantitative data are collected concurrently and later analyzed to see if there are any convergence, differences or some combinations (Cresswell, 2013).

## **2. Context and Participants**

This study took place in Turkey which is an EFL (English as a foreign language) setting. To understand whether or not the educational level (graduate/postgraduate) of university level English as a foreign language (EFL) teachers effect their epistemological beliefs and their beliefs about NEST-NNEST dichotomy, two different group of teachers were formed. Each group comprised of 10 teachers. While the first group of teachers were chosen among EFL teachers working in private colleges with no postgraduate degrees, the other group of EFL teachers had an MA or Ph.D. degree in foreign language teaching.

## **3. Procedure and Analysis**

As a data collection methodology, metaphors were used in the study to understand the beliefs of the teachers regarding NEST's and NNEST's. As Thomas and Beauchamp (2011) state, it is not always easy to explain personal beliefs with many words. They further state that metaphors enable difficult concepts like beliefs and identity to be examined in a vivid and insightful way which can allow the participants to be descriptive in their thoughts. However, it is also stated that not all participants can come up with a metaphor for the desired inquiry. Hence Goldstein (2005) suggests that samples can be provided for the participants to choose from. Mahlios, Massengill-Shaw and Barry (2010) have also stated in their study that apart from giving samples, the participants can also have an option of self-reporting or choosing from the given list of metaphors. In this study an example and an explanation were provided for the participants which followed the questions given below to extract the participants beliefs about NEST-NNEST dichotomy.

Question 1: *“What metaphor would you use to describe yourself as a non-native EFL instructor?” and why?*

Question 2: *“What metaphor would you use to describe the native language teacher?” and why?*

In order to make the process more comprehensible and in order for the participants to also express and to ease the intelligibility process for the researcher and

explanation will be given which is adapted from Thomas and Beauchamp (2011): “A metaphor is another way of saying who you are using an object or a role to represent the way you see yourself as a teacher. For example, you could say that I am a gardener because I help children grow.”

In the final stage of the study, the epistemological beliefs of the participants were further elaborated in order to understand their beliefs about the knowledge of language of their profession. In order to get an insight into this issue, rather than focusing on all the dimensions of epistemological beliefs mentioned by Schommer (1990) and Hofer (2001) such as source of knowledge, certainty of knowledge, development of knowledge and justification of knowledge; only the source and the certainty of knowledge were elaborated since the main beliefs being under study is the teachers beliefs about how they view their source of content knowledge and its representation of certainty for them. The questionnaire was adapted from Conley et. al. (2004) questionnaire items which they had adapted from Hofer (2000) and Elder (2002) in which they focused on four dimensions of epistemological beliefs that have to do with the nature of knowledge and knowing in science. The items were rated on a 5-point likert scale (1 strongly disagree; 5 strongly agree), and all questions were worded to have the teachers focus on the domain of native speakers as the source of content knowledge for non-native EFL instructors. As for the analysis of the data, a thematic analysis was conducted when analyzing the open-ended questionnaires. The process was similar to the one conducted in De Guerrero and Villamil's (2002) study in which they initially made a list of the metaphors and later created themes for relevant ones. Informed consent forms were also distributed prior to the study of ethical considerations. The adapted questionnaire items are given below.

#### *Source*

- *All English Language teachers should believe what native speakers say.*
- *In language teaching, you have to believe what the native speaker course books teach.*
- *Whatever the native speaker teacher says in language classes is correct.*
- *If you read something in a native speaker course book, you can be sure it's true and authentic.*
- *Only native speakers know for sure what the correct version of the language is.*

#### *Certainty*

- *Language is fixed.*
- *The most important part of learning/teaching a language is to learn/teach the correct standard form.*
- *Native speakers know everything about the language. There is not much more to know.*
- *Native speakers always agree on a certain form of a language.*



## Results

### 1. Epistemological Beliefs

After collecting the qualitative data, which was based on the participants metaphorical representations of their views based on native and non-native language teachers, the epistemological beliefs questionnaire was given to further evaluate whether or not there was a significant difference of epistemological beliefs depending on the participants level of education.

Table 1. *The results of “epistemological beliefs” questionnaire*

Level of Education	Mean	SD	Std. Error
Graduate	3.02	.41	.13
Post-Graduate	2.09	.71	.22

As can be seen in Table 1, while the graduate students had a mean score of ‘3.02’ (SD=.41) in their epistemological beliefs questionnaire, the post-graduate group had a mean score of ‘2.09’ (SD=.71). These initial results indicate that the graduate group of students was more prone to accept the native speaker norms and the standardization of language.

Table 2. *The comparison between the level of education*

		t-value	df	p-value
Level of Edu.	Graduate (N=10)	3.6	18	.00
	Post-graduate (N=10)			

In order to see whether or not there was a significant difference between the mean scores of the two groups a t-test was carried out (see Table 2). The results of the t-test suggest that there was a significant difference between the two groups epistemological beliefs based on the standardization of the English language and the certainty of the native speaker norms ( $t(18)=3.6, p<.05$ ).

### 2. Metaphors

In order to gain a deeper understanding of the participant epistemological beliefs based on native speakerism, the teachers were asked to conceptualize their views of NEST’s and non-NEST’S through metaphors.

#### 2.1. The Post-Graduates’ Metaphorical Conceptions

The participants with a post-graduate degree generally conceptualized themselves as an “educator” which carried certain qualifications of teaching. As it is also represented in Table 3, a participant has conceptualized the non-NEST as a **“guide”**: *“I see myself as a guide to students assisting them learning the language”*. Here, the EFL teacher’s metaphor carries the actual role of what any educator should do, which is to teach them the subject. Another participant has stated him/herself as a **“customer representative”**: *“I would use customer representative to describe myself as a NNEFL instructor because I feel myself responsible for giving information about the language, sharing my knowledge, helping them to solve their learning problems, answering their questions as much as I can”*. It can also be understood from this explanation that this teacher does not feel any sense of inferiority in terms of being a non-NEST, on the contrary, s/he perceives the profession of teaching as the way it should be. The authentic representations for the other metaphors conceptualizing the role of “educator” are given below.

Door: *“I would describe myself as a door because I encourage my students to knock and open it and enter a room where they learn new things. I assist them throughout the way.”*

Gardener: *“As a non-NEST, I would describe myself as a gardener since each student needs to be observed and be cared for”*.

Orchestra Conductor: *“I would describe myself as an orchestra conductor because in an orchestra there are so many different types of instruments and players trying to play in harmony. The conductors job is to direct the simultaneous performance of all these players”*.

Table 3. *Metaphorical conceptualizations of post-graduate EFL teachers based on non-NEST*

Conceptual categories for the non-NEST	Exemplar metaphors
1. Educator	A guide, a customer representative, a door, gardener, orchestra conductor
2. Cultural ambassador	Travel guide
3. Life-long learner	A growing pond
4. Struggler for appreciation	Surprise egg, inadequate

Another major theme apart from seeing the non-NEST as an “educator” is referring it to a “cultural ambassador”. The metaphor conceptualizing this theme is referring to the non-NEST as a **“travel guide”**: *“I would use travel guide as a metaphor describing myself because that’s how I feel in class. Giving them information about a different culture, people and language”*. In this explanation it was noticed that the focus was not on the teaching pedagogy itself but rather on the content which was conveying a different culture. As for the metaphor **“growing pond”** which is thematized as “life-long learner”, the participant has stated: *“As a non-NEST, I can describe myself as a pond which gradually grows and expands because language is alive and infinite.”*

*Language is evolving and there is no end to learning it*". In this statement it can also be seen that the participant epistemologically views language as a dynamic structure rather than something being fixed, hence, s/he suggests a concept of life-long learning. The final major theme is "the struggler for appreciation". The metaphors relevant to this theme generally focus on the misconceptions that people have towards non-NEST and for this reason they state that they have to struggle extra to improve themselves and to gain awareness that being a non-NEST is not a deficiency.

Surprise egg: *"I would say that I am like a surprise egg. Because when you look from the outside all the surprise eggs are the same. Everybody would say okay she is just another non-native EFL teacher. However, they don't actually know me. Then when I start to teach and touch upon my students' life, they would see that I am not the same with other teachers. I think every non-native teacher is different. It is not fair to be judged because of this title. Unfortunately we have to struggle to show that we are unique, an extra effort is put on us to compensate for not being a native speaker of the target language we are teaching"*

Inadequate: *"Unfortunately the first thing that comes to my mind is 'inadequate' because this is how you are made to feel- at least at a time that you develop an awareness of how 'advantageous' being a NNEST actually is. Yet, a lot of teachers retire without this awareness. This has started to change, yet I believe we have a lot to go, though"*

Table 4. *Metaphorical conceptualizations of post-graduate EFL teachers based on NEST's*

Conceptual categories for the NEST	Exemplar metaphors
1. First choice of students	Treasure, magician
2. Life-long learner	A growing pond
3. Advantageous without deserving	Royals, backpackers (x2)
4. Provider of authentic resource	Parent
5. Provider of correct language	Tourist guides, mirrors, dictionary

As the post-graduate groups' metaphors based on the NEST's, the first theme to be realized in table 4 is "first choice of students". The first metaphor to represent this theme is "**treasure**": *"When I think about our students and their behavior to native speakers, I would use the metaphor 'treasure' because they always feel more interested and more eager when a native language teacher comes to the class"*. Through this explanation it can be easily understood that the teacher has constructed a belief through own experiences that students favor NEST's and that they are more motivated in this aspect. As for the theme "**magician**": *"I would use magician as a metaphor because they have the advantage to draw students' attention in any classroom setting and students love them and have a tendency to admire and listen to them like audiences"*. Another interesting theme was seeing the native language teachers as life-long learners, too, through stating the metaphor "**growing pond**": *"I would describe*

*the native language teacher as a pond that grows day by day, too, because whether native or not, as language teachers we have to keep up with the changes regarding language use and language teaching methods".* It can be seen from this statement that the teacher does not upload any privileged qualifications on the native language teacher, rather s/he states that they, too, should always self-develop themselves. Some of the participants indicated through their metaphors that the NEST's were advantageous without really deserving it. One of the participants conceptualized this thought through stating them as the "**royals**": *I would use 'royals' maybe because everybody treats them as if they were the royals and they are seen as the privileged ones. However, as we know all of the royal people are not actually qualified to rule, but they just have the right to rule because of their birthright. It is the same for the native language teacher".* Another metaphor referring to the same theme was "**backpackers**": *"NEST's are backpackers in my opinion- at least the ones who do not hold a pedagogical degree. So many things are taken for granted when it comes to native speakers even though they do not have the pedagogical qualifications they hold important positions in educational institutions and are paid more than non-native language teachers".* It can be understood from these statements that the teachers approach the native/non-native issue critically and express how they find it irrelevant to prioritize the NEST's in the industry. The metaphor "**parent**" was conceptualized as provider of authentic resource: *"I would use 'parent' to describe the native language teacher. They give importance to communication and they use the language in a larger extent both in and out of the classroom. Therefore, they give plenty of input to the students and they do not focus on accuracy as much as we do, they enable the learners to use the language as much as possible in real context".* In the last theme, which is "provider of correct language", even though the teachers state that native language teachers can provide the correct form of language, they still have certain critics based on the issue based on pedagogical considerations rather than epistemological ones.

Tourist guides: *"I would describe the native language teachers as 'tourist guides' who show the correct paths to the people involved in the journey. However, this should not be taken for granted. They should have teaching experience"*

Mirrors: *"I would use 'mirrors of the target language' as a metaphor because they reflect and show how the language is used properly and correctly. But we need to remember that there is always more to see beyond the mirror about the teaching of language and the use of language"*

Dictionary: *"I think the native language teacher is like a dictionary. She knows most of the language content and can be considered as an authority. However, despite knowing structures and foundations of language, she might have problems with the teaching of the language"*

## 2.2. The Graduates' Metaphorical Conceptions

The first theme of graduates metaphorical conceptualizations based on non-NEST's, seen in table 5, is "cultural ambassador". This theme was created in relation to the core meaning the metaphors carried. One of the teachers stated that s/he viewed the non-NEST's as "**informers**": *"I can describe the non-NEST's as 'informers' because we teach the target culture and language and this has many educational benefits for the students"*. Another relevant metaphor was "**service-point**": *"We are like 'service point'. We serve another culture and language by teaching it correctly to students"*. It can be seen from this explanation that the teacher also focuses on teaching the correct form of the language which epistemologically implies teaching the standardized language form. Similarly, a final metaphor for the first theme is "**bridge**": *"I think I am a bridge of the English language to the Turkish students. We serve as bridges, we connect the two societies. I try my best to teach the language and correct the students if they make mistakes"*.

Table 5. *Metaphorical conceptualizations of graduate EFL teachers based on non-NEST's*

Conceptual categories for the non-NEST	Exemplar metaphors
1. Cultural ambassador	Informer, service point, bridge
2. Provider to success	Key maker
3. Life-long learner	Tree (x2)
4. Educator	Leader, host
5. Transferor to the mother tongue	Tennis racket

The metaphor "**key maker**" which conceptualizes the theme "provider to success" was explained as: *"I describe myself as a key maker, if we accept English language as a door which is opened to the whole world, we the English teachers make the keys of it. We show them the correct door, open it and teach how to step in"*. It can be seen in this remark that the teacher sees the language as a means to interact with the world and to lead to success. Similar to the post-graduate group, two of the teachers regarded themselves as educators without making any distinction about being a non-native language teacher. One of the teachers used the metaphor "**leader**" referring to being the leader in the classroom: *"As a NNEST, I can describe myself as a leader because I can try to teach every kind of thing to my students. I try to direct their lifestyles, their thoughts and their feelings as a teacher"*. The final theme, which is "transferor to the mother tongue" was expressed through the metaphor "**tennis racket**". While explaining the metaphor, the teacher emphasized on the disadvantages of using the students' mother tongue in the classroom due to responding to students' usage of language: *"I would use a 'tennis racket' to describe myself as a NNEST. That's because I speak English or Turkish depending on the language my students speak. I know that this shouldn't be done in language classrooms but it is difficult to not speak Turkish in certain times"*.

Table 6. *Metaphorical conceptualizations of graduate EFL teachers based on NEST's*

Conceptual categories for the NEST	Exemplar metaphors
1. Provider of correct language	Mother, skeleton of the body, magician, artist, dominance
2. Equal to non-NEST's	Identity card, ordinariness
3. Lacking of pedagogical skills	Guest
4. Independent	Tennis court

The first theme with the majority of references, in terms of graduate-level EFL teachers' metaphorical conceptualizations based on NEST's, is "provider of correct language" (see table 6). This also gives a sense that the majority of the teachers assume that native speakers' language norms or standardized English is the correct form to teach.

Mother: *"The native language teacher is like a mother. They guide the students and make them acquire the correct form of language"*

Skeleton of the body: *"They are like the skeleton of a body because natives are symbols, they are the past and the generation of a language, culture, country, society, civilization etc. they have the power"*

Magician: *"A native language teacher is like a magician. You see only a cap but there will be everything necessary inside for the students to learn the language"*

Artist: *"A native teacher is like an artist. They see the right color, all the shades and tones. Because they can explain some facts that non-EFL instructors are not able to understand"*

Two of the teachers with a graduate degree expresses that they viewed both native and non-native language teachers as equal. The first metaphor used to conceptualize this theme is "**identity card**": *"I see no difference between us, but I can say they are different identity cards. Being a native doesn't mean you lead a good teaching. Natives and non-natives, we are different numbers on the same clock".* The second metaphor is "**ordinariness**": *"I see them as ordinariness. They are normal teachers. They don't have any differences to other teachers, they just speak their language very fluently but this doesn't mean they are always perfect".* The metaphors for this theme indicate that, epistemologically the two teachers do not see any difference between the native and non-native language teachers. One of the teachers have also stated that native language teachers lack pedagogical skills. S/he has conceptualized this theme with the metaphor "**guests**": *"I would use 'guest' to describe the native language teachers because despite many advantages they have such as their language knowledge, using NEST's as teachers may result in some problems. Most of them have excellent language skills but little teaching skills. They may have some problems understanding students' problems. Most of them do not adopt the job and have difficulty in classroom"*

*management*". In the final theme, through using the metaphor "**tennis court**" the teacher implied how free the native language teachers are in speaking their language: "*I would use a 'tennis court' to describe a native teacher because he feels quite free to speak English during the class. They don't have any drawbacks because they are very fluent and correct*". Through this final metaphor it can be seen that the teacher epistemologically regards the native language teacher as the correct source of language knowledge and also a feeling of inferiority can also be noticed in his/her statement.

## **Discussion**

Similar to De Guerrero and Villamil's (2002) study, it should initially be stated that the present study does not focus whether or not the teachers reflect their conceptualizations which they have presented through their metaphors, in their actual teaching practice. Rather, it aims to understand the conceptualizations they have constructed based on the NEST/non-NEST dichotomy and its relation to their underlying epistemological beliefs.

According to the epistemological beliefs questionnaire, which was adapted in accordance to the "native speakerism" and the standard language ideology as the core content of language teaching, a significant difference was found between the post-graduate and the graduate group of teachers. While the post-graduates were more critical in their responses, stating that they disagreed with a high frequency of the items, the graduate group of teachers was less critical in this respect. As Hofer and Pintrich (1997) suggest, epistemology is an area of philosophy which deals with the nature and justification of human knowledge. The results indicated that, in terms of epistemological beliefs, the graduates were more prone to accept the standard form of English as the correct form while the post-graduates were more critical about the issue. The results are actually quite important since as Schommer (1994) states, the implicit beliefs about the nature of knowledge and learning, or epistemological beliefs, can affect reasoning, learning, and decision making which results in carrying great importance in educational sciences and in teacher education since teachers' implicit beliefs about knowledge can actually shape the way they view their subject area of teaching and the way they teach. Similarly, as Lunn Brownlee et. al. (2017) state, recently, researchers have focused on how teachers' epistemic cognition can give insight into their professional development and their teaching practice (e.g., Lunn Brownlee, Schraw, & Berthelsen, 2011; Lunn Brownlee, Schraw, Walker, & Ryan, 2016). Buehl and Fives (2009) have found in their study that student teachers epistemic cognition can significantly affect their teaching approaches and techniques, and their expectations from their students. The fact that in the present study, certain group of EFL teachers view the English language as fixed in terms of native speaker norms (generally standard American or British English) can actually affect the way they approach the language, the way they teach, the way they approach themselves as a non-NEST and the way they see themselves as efficient EFL teachers. These

aspects of beliefs are rather crucial since being a native speaker is generally seen as a rigid category in which transition is implicitly implied to be impossible. As Llorca (2015) states, since the communicative language teaching became as the dominant theoretical framework in language teaching, it was implicitly implied that the native speakers were the one and only source of natural, spontaneous and authentic source of knowledge. It became clear that the native speakers in the field were regarded to be more prestigious. Cook (2007) mentions about how students are judged about how close they resemble native speakers in terms of their competency, proficiency and their knowledge about the language. However, these issues need critical discussion since they lead to discrimination in the profession of English language teaching and a sense of inferiority among non-native English language teachers.

In order to get a deeper understanding of the two different groups of teachers' epistemological beliefs, they were asked to conceptualize their beliefs of native and non-native language teachers through metaphors. The reason for why metaphors were chosen is actually relevant to De Guerrero and Villamil's (2002) ideas in which they state that metaphors have an ability to capture the complex constructs in the field of teacher education and they also have a utility as vehicles for raising reflection and consciousness. The majority of the post-graduate level of EFL teachers generally regarded themselves as non-natives as educators. They did not reveal any sense of inferiority or they did not conceptualize any prioritizing of native speakers. As for their metaphors based on NEST's, the results seemed to be in correlation with the epistemological beliefs questionnaire results. The teachers either referred to seeing no difference between natives and non-natives and that both groups should improve themselves gradually since language is a dynamic system. This also implies that epistemologically, language was not seen as fixed, hence, standard norms of language were opposed. It was also noticed that the post-graduate group of teachers were aware of the social factors which affect native-speakerism in the field. Some of them viewed the NEST's as treasures or magicians since they can easily capture the students' motivation due to the fact that students favor native speakers as English language teachers. Differently, two of the participants from the post-graduate group stated that NEST's were like mirrors and dictionaries. They expressed they were somehow the representative of the correct form of language, however, they criticized the issue in terms of pedagogical knowledge, stating that they do not have the necessary pedagogical knowledge. It was seen that while some teachers questioned the fact of the standardized form of the English language in a globalized world where English speakers of other countries far exceed the number of native speakers in the world (Graddol, 2006) which inescapably results in variations of the English language, others were more critical about pedagogical considerations rather than the language content itself. As mentioned earlier some of the participants also saw them as mirrors which reflect the correct form of language.

The metaphors of the graduate level of EFL teachers generally regarded themselves as non-NEST's as cultural ambassadors whose job is to teach their students the



language and the culture of another nation. They also stated through their metaphors that they aimed to teach the correct form of the language which epistemologically implies the belief based on the acceptance of the standard forms of language. These can also raise some critical issues such as the ownership of the language. Do these teachers feel like they own the language as the teachers and the users of the language itself? If not, how do they perceive their profession and how do they perceive themselves as teaching a language which they do not feel the right to claim rights? Medges (1994) focused in her study how this power-related status and ownership issues created the existence of generic inferiority complex among NNEST's. This was rather tragic since this type of belief had a negative impact on non-native teachers' professional self-esteems (Llurda, 2015). As for the graduate EFL teachers metaphors based on the native language teachers the majority saw them as the provider of the correct form of language. They expressed this belief through metaphoric conceptualizations such as mother, skeleton of the body, magician, artist and dominance. The teacher who conceptualized the NEST's as an artist explained this view through stating that native language teachers see the right color, the right shades and tones because they can explain some facts that non-EFL instructors are not able to understand. Through this statement, it can be understood that the teacher might have the feeling of inferiority in his/her teaching profession. This view is inevitably co-constructed through the social environment and the experiences this teacher must have gone through. The teacher education programs also have a role in these belief constructions which is also stated in Lortie's (1975) terminology of appreciation of observation.

## Conclusion

Apart from the power-related issues regarding symbolic possession of a particular community of language, one of the fundamental points which confuses people in terms of issues regarding World Englishes, ELF, EIL, NEST & NNEST are generally the concept of "standardization", especially in terms of the teaching of English and in terms of the use of English regarding institutional and communal needs. Epistemologically, *What do we mean by standard? What is standard?* These kinds of questions in the field give rise to concerns regarding its necessity. But when we think about it, standardization, which in its core meaning refers to rigid norms and stability, is an extremely controversial term when we think about the dynamic nature of the language itself (especially in terms of lexis). Since English has become to be a global language used by billions of people around the world to meet their communicative and communal needs, nothing is more normal than it to be diversified. Adapting the language, making meaning of it and locally developing the language is an inevitable consequence of an international language. Hence, it seems illogical for native speakers to claim right over these localized versions of the language since they should definitely not be compared to standardized American or British English because they are unique and rich in themselves, representing their own culture and communal needs of the adopted group. Also, when you think about certain terminologies such as

the multi-competence approach (Cook, 1999) and translanguaging (Garcia, 2011), you can get an idea that becoming an L2 user is going beyond being a native speaker since L2 users develop a complex mental and socio-communicative system. This richness can definitely be an advantage for the non-native language teachers since they have a great sense of language awareness and they also are a product of metissage which can be a valuable source for language learners in various contexts. Constructing this epistemological belief and awareness to non-native language teachers in their teacher education programs can definitely develop their professional self-esteem in the field since the student teachers epistemological beliefs shape the knowledge they gain from their observations of other teachers and their own teaching goals which shape the approaches to teaching and learning.

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# Leftization of Education in South Korean Society Centering Around the Authorized Textbooks

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## Abstract

In South Korea, education is no longer a place for learning, but a base for preparing ideological warriors, due to left-wing ideology education and fervent and conscientious teachers' union and strong left-leaning media. Since left-wing president Moon took office in 2017, omnidirectional "leftization" of education is ongoing in society. According to Prof. Chul-hong Kim, the current left-leaning "authorized" textbook system strenuously inculcates students with the appropriateness of materialistic historical views. A high school student engaged in the protest against the campaign of "state-designated" textbooks says at a press interview, "I'm a proletarian class. It's only the proletarian revolution that can change our social structure and its fundamental contradiction."<sup>1</sup> For reference, there are three kinds of textbooks: (1) state-designated textbook published by state (so, its copyright belongs to state), (2) authorized textbook published by private publishing companies, on the condition of passing through the government screening system (inviting criticism for its "poor screening"), (3) free-published textbook left entirely to the private sector without any state intervention. Prologue The second authorized textbook system is a "compromise" plan between state-led and privately-led textbooks. The main motive for adopting authorized textbooks (from previous state-designated textbooks) was to introduce "diversity of views and opinions" in Korean education, but a conservative journalist Gap-je Cho concluded - from analyzing 14 authorized history textbooks - that "promoting educational diversity" by authorized textbook system ended in failure. Because a great majority of left-wing professors and teachers take part in writing historical textbooks on the basis of Marxist class struggle theory: that is, Koreanized "popular view of history" or populism-based historical perspective (民衆史觀). These authorized textbooks are adopted by almost 99% of high schools across the country. Moreover, they tend to implant one "monolithic" idea (historical materialism) in the consciousness of young students. According to Cho, the authorized

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<sup>1</sup> Hyo-jung Kim, [in Korean] "If we consider five big events that leftize Korean society," *Weekly Chosun*, December 15, 2015. Retrieved from <http://weekly.chosun.com/client/news/viw.asp?nNewsNumb=002386100005&ctcd=C02>

textbook system mired in controversy is degraded into a “certificate” of anti-state, pro-communist education, in place of diversity.<sup>1</sup>

**Keywords:** leftization, education, south korea, authorized textbooks

## Introduction

Today the terms “left-wing” and “right-wing” are used as symbolic labels for soi-disant progressives and conservatives in South Korea. A hot controversy over the relationship between left-wing progressives and right-wing conservatives is a snare of Korean academic society, almost impossible to escape once you are trapped in. The left-right metaphor is a specialty of the Earth. At first glance, the concept of left and right seems to indicate direction, but it’s almost completely static in reality. On the contrary, the idea of progressivism or conservatism can be different for different situations. Being “progressive” is up to those to criticize the power of vested interests and the problem of dominant ideology, and to be emancipated from them. Both left and right wings can be progressive; therefore, progressivism is no longer the exclusive property of leftism, despite the unilateral claim of South Korean leftists who want to preempt/monopolize progressive values and really don’t like being called “communists,” “Reds,” or “followers of North Korea.”

The biggest variable in the political propensity of South Koreans is North Korea. South Korean leftists are very compassionate towards North Korea from a nationalistic point of view, but the concept of nationalism is considered as a right-wing element in the West. Historically, those who called themselves “progressives” have not only captured the political agendas, such as human rights, anti-war campaign, and anti-nuclear movement, but also struggled for the realization of their objects. However, South Korean leftists called “progressives” bizarrely keep silent about the “human rights” in North Korea. Vis-à-vis the North Korean nuclear issue, they are busy downplaying the danger of NK’s nuclear development. So, they voluntarily lose their progressiveness. South Korean leftists claim to advocate progressivism or democracy, but they are branded as pro-North, anti-American, anti-Japanese Koreans, Gangnam leftists<sup>2</sup> and the Reds. On the other hand, Korean rightists claim to stand for capitalism, liberalism, market economy, individualism, and anti-communism. They go by the nicknames “conservatives,” “anti-communists,” “industrial warriors,”

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<sup>1</sup> Gap-je Cho, [in Korean] “The authorized textbook system: why has it failed?,” Chosun Media, September 23, 2015. Retrieved from <http://pub.chosun.com/client/news/viw.asp?cate=C03&mcate=M1008&nNewsNumb=20150918393&nidx=18394>

<sup>2</sup> These days, the newly-coined term, “Gangnam leftists,” is quite fashionable in Korean society. The term, which refers to leftist activists who reside in the rich district of South Seoul, is similar to the pejorative American term, “limousine leftists”; Seong-kon Kim, “Gangnam leftists vs. Gangbuk rightists,” *The Korea Herald*, May 17, 2011. Retrieved from <http://www.koreaherald.com/view.php?ud=20110517000825>

“authoritarianists,” “pro-Japanese/pro-American Koreans,” “Taegyeuk (Korean national flag) crusaders,” and “*tultak* people whose dentures are stiff (crazy conservative old people).<sup>1</sup>

We can also enumerate Antonio Gramsci and Louis Althusser as the representative foreign thinkers who have largely influenced South Korean left-wing scholars. At the bottom of Korean leftism, the old-fashioned *Juche* ideology is also added, due to Korean historical particularity (national division of North and South).<sup>2</sup> Thus, South Korean left-wingers, with the catchphrase “*unriminzokkiri* (Our People Together),”<sup>3</sup> are just “pro-North” Koreans locked in the old communist frames, without knowing the living zeitgeist called “progress” that keeps evolving all over the world.

South Korean left and right-wings are now engaged in an ideological war of attrition, but this war is not using force of arms, but high-tech cultural media. According to prof. Chul-hong Kim, the so-called textbook war heating up in the educational world is a historical war, and this historical war is nothing but a synchronic cultural war. It means that Korean left-wings could seize cultural hegemony in art, culture and education, etc. According to Prof. Young-hoon Rhee, Korean history textbook controversy is a religious war to liberate our “free reason” from the demonized nationalistic powers. To understand the “untimely” textbook war, we should know how left-wing ideology has taken roots in all sectors of the country. Their beginning was in the university towns in 1980s.

This paper is divided into two diachronic/synchronic sections: (1) five big events which can move South Korean society into the left (2) education under the darker shadow of socialism.

## II. Five big events which move South Korean society into the left

### 1. Introduction of *Juche* ideology into university towns in 1980s

Left-leaning Korean textbooks are a byproduct of what we call “popular view of history” (as an opposite of elite view of history) that came in the eighties. The mutations of historical materialism take the form of: (1) popular view of history in

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<sup>1</sup> The *tultak* refers to the elderly people who behave in an entitled manner, or, in some annoying manner. It comes from two Korean words “*tulni*” (dentures) and “*taktak*” (onomatopoeia for click-clacking sounds).

<sup>2</sup> *Juche* is usually translated as “self-reliance.” It is the official state ideology of North Korea, described by the government as “Kim Il-sung’s original, brilliant and revolutionary contribution to national and international thought.” It postulates that “man is the master of his destiny,” that the North Korean masses are to act as the “masters of the revolution and construction” and that by becoming self-reliant and strong a nation can achieve true socialism.

<sup>3</sup> The term can be broken down into *uri*, meaning “we”, “our”, or “collective self”; *minjok*, meaning “race”, “people,” “nation,” or in this case simply “Koreans”; and *kkiri*, meaning “with,” “between,” “together,” in some cases with an exclusionary nuance, presumably intended in this case to convey the notion that Korean issues are to be solved by the Koreans themselves and not third parties or superpowers.

South Korea and (2) *Juche* (self-reliance) view of history in North Korea. The former brings “people” (instead of famers and workers) up as main protagonists of history, whereas the latter claim to advocate “humans” (instead of materials) as prime movers of history. For reference, the *Juche* ideology is no more than a deification of Il-sung Kim (1912-1994), communist dictator of North Korea. Those who support the popular view of history (民衆史觀) do not only consider Republic of Korea (ROK) as a colony of American imperialism, but also sees Korean modern and contemporary history in a conflicting structure frame “ruling class vs. common people” in form of Marxism-Leninism.

In the mid-1980s, student movement started to metamorphose into heterogeneous one by taking *Juche* ideas as a guiding ideology for action. The political pamphlet *Subordination and Cry* being passed around secretly in 1983 marked the beginning of *Juche* ideology movement in South Korea. According to this pamphlet, Korea is a colony of American imperialism and the U.S. has a control of Korean military regime. With the advent of famous *Letters of Kang-chul* (in the form of sending letters by a labor activist called “Kang-chul (pen name)” to young students) in 1986, *Juche* ideology became mainstream in university towns. Kang-chul asserts that 100 years of Korean modern history have been dotted with invasions and people’s struggles against Japanese/American imperialism, and that Korean society is still colonized by US, so it’s necessary to be freed from it through the communist revolution. In the past, most South Korean activists saw both North and South Korean military regimes as their main adversaries, but they target only the U.S. and its imperial invasions. On March 1986, the Confederation of Students for National Salvation was founded at Seoul National University. On April 1986, this confederation formed a struggle committee for anti-fascist independence, anti-American democratization (*Jamintu*). This struggle committee gained the hegemony in nation-wide student movement through their fierce struggles for popular democracy and launched the Nation Council of Student Representatives (NCSR) in 1987. Now, many of the top positions of the left-wing Moon government are occupied by people who used to be key-members of the NCSR.

## 2. Launch of Korean Confederation of Trade Unions in 1995

The big struggle of workers after the June struggle<sup>1</sup> served as a momentum to provide them with political empowerment. The camp of labor movement could not only gain self-confidence through 3 300 labor dispute cases, but also concentrate their energy to create another new labor union against the first and only legalized Federation of Korean Trade Unions (FKTU).<sup>2</sup> In 1990, 600 branches of labor union took part in

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<sup>1</sup> The June Struggle was a nationwide democracy movement in South Korea that generated mass protests from June 10 to June 29, 1987.

<sup>2</sup> The Federation of Korean Trade Unions (FKTU) was formed in 1960, after a military coup and the dissolution of the General Federation of Korean Trade Unions and its affiliates. The FKTU was placed

forming a Korean Confederation of Trade Unions (KCTU). In the beginning, the Young-sam Kim government (1993-1998) considered it as illegal, but the president Kim decided to accept “multiple” labor unions in the wake of general strike by the KCTU. After the president Kim’s meeting with two opposition leaders, the KCTU was finally legalized. Soon, they entered the arena of politics. In 1997 they formed a new labor party to run a radical candidate in the 1997 presidential election. Mr. Kwon, chairperson of the KCTU, became a presidential candidate and he gained 1.2% of the vote (about 300 000 votes). In 2011 they reorganized the Unified Progressive Party (UPP). In 2014 the Constitutional Court dissolved the UPP by founding it illegal.<sup>1</sup> According to Prof. Chul-hong Kim, the political struggle of the KCTU is an external war with the US, but also an internal war between bourgeois class symbolized by Korean conglomerates called “*chaebol*” and workers represented by the KCTU. As a result, previous anti-American and anti-imperialistic *Juche* movement in university towns in 1980s is now passed down to the KCTU.

### 3. Legalization of Korean Teachers & Educational Workers' Union (KTU)

The Korean Teachers & Educational Workers' Union (KTU) was founded in 1989. In 2013 Young-ju Go, chairman of the Foundation of Broadcast Culture, maintained that the reality of “true education” the KTU claimed to advocate is a “communist” education. Chairman Go, a former public safety prosecutor, came to read a secret memo of suspects by investigating the trial on the “periodicals of people’s education” in 1985 and learned their true identity. It said that it’s necessary to conscientize elementary, middle and high school students, and further to organize a union of teachers to achieve people’s revolution. When the reality of true education was reported in the press, more than 90% teachers of the KTU severed themselves from the organization. Those who did not secede from the KTU were dismissed till the early 1990s. Since then, they have started political struggle against the government to re-legalize the KTU. This struggle by the first generation of the KTU lasted almost ten years. The left-wing Dae-jung Kim government (1998-2003) legalized the KTU. Consequently, the KTU could move into high gear with their solid organizational power.

In 2001, Soo-ho Lee, former chairman of the KTU, claimed that the National Security Law<sup>2</sup> is an evil law to obstruct advanced ideas & learning, progressive social movement, and to foster “clique consciousness,” saying “discard your guard against

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under the guidance of the military authorities. The FKTU was the sole legal trade union center in South Korea until the Korean Confederation of Trade Unions was finally recognized, in November 1999.

<sup>1</sup> The South Korean government petitioned the Constitutional Court of Korea to dissolve the UPP due to their alleged pro-North Korea views in November 2013, two months after the UPP members allegedly involved in the 2013 South Korean “sabotage plot” were arrested

<sup>2</sup> The National Security Act is a South Korean law enforced since 1948 with the avowed purpose “to secure the security of the State and the subsistence and freedom of nationals, by regulating any anticipated activities compromising the safety of the State.” In other words, the act made communism illegal.



North Korea!" Indeed, teachers of the KTU continuously shouted anti-Americanism, anti-war peace, abolition of national security law and withdrawal of US armed forces in South Korea, as their provocative slogans. In 2000s, many of them were often arrested or indicted for violating the national security law.

According to *Joongang Monthly Magazine: November 2004 Issues*, the analysis suggests that left-wing camp will succeed in seizing power for 20 years, thanks to militant teachers of the KTU leading and using the public opinion. Since the legalization of the KTU, the left-wing conscientization movement has started in earnest, in order to develop the 2<sup>nd</sup> and 3<sup>rd</sup> generations of the KTU. The KTU was and still is the nucleus of leftist movement in South Korean society. The kernel of opposition forces against the restoration movement of state-designated textbooks is the KTU. All key people involved in the political struggle to abolish state-designated textbooks come from the KTU.

#### 4. Establishment of Korean Film Commission in 1999

In 1999 the left-wing Dae-jung Kim government disbanded the Korea Film Promotion Corporation and established the Korean Film Commission. From then on, Korean film world began to be rapidly leftized. For example, Korean People Artist Federation (KPAF) founded in 1988 by 838 pan-genre artists fighting against dictatorship and institutionalized arts took the lead in the leftist "people" art movement. Since 1993, the KPAF has transformed from previous resistance-driven into more democratic, more mass-oriented movement: from voluntary into incorporated association to expand throughout the whole country. In 2002, 700 people in culture and art communities formed a support movement called "Rohsamo" (literally meaning people who love Roh).<sup>1</sup> With the inauguration of the leftist Moo-hyun Roh government (2003-2008), they gained political empowerment in culture and art world. For one thing, Chang-dong Lee, a left-wing film director, served as South Korea's Minister of Culture and Tourism from 2003 to 2004. Yoon-soo Kim, former chairman of the KPAF, was appointed as the director of the National Museum of Modern and Contemporary Art (MMCA). With the rightist Myung-bak Lee government (2008-2013), some right-wings were appointed, but it was difficult for them to put down roots in the left-leaning movie world. There is a considerable problem with some hit movies over the most recent 8-9 year period. The Korean films *Shiri* (1999),<sup>2</sup> *Joint Security Area* (2000),<sup>3</sup> and *Welcome to Dongmakgol* (2005) skillfully erase the ideological difference of two Koreas by leaving the audience "defenseless" against communist ideas. For reference, *Welcome to Dongmakgol* that

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<sup>1</sup> Moo-hyun Roh (1946 -2009) was a South Korean politician who served as President of South Korea (2003–2008).

<sup>2</sup> *Shiri* was the first Hollywood-style big-budget blockbuster to be produced in the new Korean film industry. It also contained a story that draws on strong Korean national sentiment to fuel its drama.

<sup>3</sup> This mystery thriller film concerns an investigation into the circumstances surrounding a fatal shooting incident within the DMZ, the heavily fortified border that separates North and South Korea

entered the 3<sup>rd</sup> grade middle school textbook describes Korea during the Korean War in 1950. Soldiers from both North and South, as well as an American pilot, find themselves in a secluded village, its residents largely unaware of the outside world, including the war. The story is based on two themes: (1) the cooperation and reconciliation between North and South Korean soldiers who fight together against the merciless attack of American bombers and (2) their glorious death. Another anti-American films *Taegukgi: The Brotherhood of War* (2004)<sup>1</sup> and *May 18* (2007)<sup>2</sup> are also included the textbooks. In particular, the *Host* (2006)<sup>3</sup> is portraying US as the root of evil. *Veteran* (2015) that recorded over ten million viewers<sup>4</sup> is based on anti-business, anti-capitalistic sentiment.

On the other hand, South Korean television dramas - *Misaeng: Incomplete Life* (2014) or *Good Manager* (2017) about which young people are enthusiastic - tend to instigate a mockery or a hatred for big companies. For example, the TV drama *Good Manager* by the main public broadcaster KBS<sup>5</sup> starts with the following publicity texts: "pocketing, embezzling and a bribe paradise Korea!" That's always the way big companies operate with bribery and unauthorized business operations or Korea is a Hell Chosun (old Korea). It's a socialist way of thinking to deny income/status gaps based on individual competitions. This anti-capitalistic mode of thinking is rapidly spreading through the left-leaning mass media. Ironically, it is easy to see some young people enjoy capitalist lifestyle, openly saying "changing societies is not possible without breaking down capitalist class by working class!"

## 5. Adoption of authorized textbooks in 2003

The authorized textbook system was first introduced into history textbooks after the enforcement of 7<sup>th</sup> curriculum (2003), under the left-wing Moo-hyun Roh government. The current authorized textbook system was formed in 2010. According to the book *How have Korean history textbooks been leftized*, it started with young scholars influenced by the popular view of history (民衆史觀) in 1980s. They were jumping to write Korean history textbooks with enthusiasm. They formed a think-tank on people's historiography after the mid-1980s and vigorously carried out two missions: (1) severe criticism on previous state-designated textbooks in the name of diversity and (2) mass publication of new textbooks for wider public use. For example, 5 out of 6 writers of authorized history textbooks by Samwha Printing are members of the KTU or the Association of Korean History Teachers (AKHT) that

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<sup>1</sup> It tells the story of two brothers who are forcibly drafted into the South Korean army at the outbreak of the Korean War.

<sup>2</sup> The film is based on the massacre at Gwangju on May 18, 1980. It occurred when General Doo-hwan Chun tried to eliminate any rebels by using military force. If *Taegukgi* transcendentalizes cruel war into sublime brotherhood, *May 18* is a propaganda movie instigating "antagonism against Korean army" by highlighting the crackdown of air bone troops.

<sup>3</sup> It's a 2006 South Korean monster film directed by Bong Joon-ho.

<sup>4</sup> *Veteran* is a 2015 South Korean action comedy film written and directed by Seung-wan Ryou.

<sup>5</sup> Korean Broadcasting System.

already have over 2 000 members (1/3 of all history teachers across the country). Thus, the golden age of authorized history textbooks has been accomplished by Korean popular historians, teachers of the KTU and teachers of the AKHT endorsing people's history or history from below. This actual war on textbooks shows well that Korean leftists' conscientization movement did not come overnight; therefore, it's necessary to understand the historical contexts to win this textbook war between two opposed camps.

### III. Education under the darker shadow of socialism

#### 1. On the Alert: Korean-styled *yutori* education

Three prohibition policies and three “noes” policies Korean left-wing superintendents of education are zealously pushing forward may be summarized as follows: 3 prohibition policies of prerequisite learning, individual university admission exam and out-of-school activities and 3 no-exam, no-homework and no-discipline policies.<sup>1</sup> The real condition of Korean education is compared to the case of failure of Japanese “*yutori*” (latitude) education or education that gives children room to grow.<sup>2</sup> The *yutori* education was introduced into Japan in 1990s in order to better support “experience & activity-focused education” escaping from excessive competition in entrance examinations or rigid education system that is focused around cramming and memorization. However, Japan abolished it in 2007 due to marked decline in the academic ability of students and disparities of student achievement. In recent years, the mass media in Japan have used this phrase to criticize drops in scholastic ability.

Nevertheless, the actual left-wing Moon government is pushing for Korean-styled *yutori* education under the highest goal of reducing heavy study burden or academic stress on students and excessive private education expenses. By way of illustration, the prohibition of prerequisite learning ignores large differences among students in the classroom. So, it's difficult for teachers to give rational guidance to top-ranked students. As a result, it inversely accelerates the collapse of public education in crisis. Left-wingers bitterly oppose the “rankization” of schools and students, because they think it fosters “social disharmony” among students by raising some privileged students to the modern day peerage. In regard to three “noes” schools, left-wing superintendents are immersed in child-centered education. They consider fierce entrance exam-oriented competition and blind education fever, as deep-rooted problems to eradicate. Saying “our children are not happy” with insistence, they tend to exaggerate the agony of students and the side-effects of rankization.

The problems facing the Korean education caught in a trap of leftist values can be summarized into two words: high expenditure and low efficiency. Even though more than 60 trillion wons (Korean monetary unit) of annual budget (2017) were poured

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<sup>1</sup> In addition, policymakers are strongly advocating ‘three bans’ - on universities’ own written admission tests, grading of high schools and college admissions in return for financial contributions  
<sup>2</sup> *Yutori* education may be translated as “relaxed education” or “education free from pressure.”

into education, more than half of middle and high school students could not follow their regular classes. The academic ability of university students is showing steep declines, but the competitiveness of Korean education is also absurdly low in over-educated world. According to IMD (International Institute for Management Development) Korean education competitiveness is ranked 37<sup>th</sup> in 2017, down 4 notches from last year.

On the other hand, Korean private education market amounts to more than 18 trillion won. It could leave the public education teetering on the brink of collapse, and mass-produce “silver poors” (poor senior citizens) or “edu-poors,”<sup>1</sup> due to huge private education costs forming a great part in their household economy.

What is the main cause of overheated private education culture prevailing in Korean society? It is said to be a byproduct of the Era of High Economic Growth. In the past, the most important key to success was to gain entry to the best universities. It was easier for those graduated from prestigious universities to get a good job or a rapid promotion in company. Thus, a growing number of parents began to invest in private education as a way to make their children successful. Nowadays, however, the overgrowth of private education market comes from the crisis of public education locked in the trap of left-wing values.

	2017				
	Total private education expenses (hundred million won)	Annual average private education expenses per student (10,000 won)	Monthly average private education expenses per student (10,000 won)	Private education participation rate (%)	Private education participation time (average time per week)
Total	186,223	325.3	27.1	70.5	6.1
Elementary school	81,195	303.6	25.3	82.3	6.7
Middle school	48,181	348.8	29.1	66.4	6.4
High school	56,847	340.5	28.4	55.0	4.9
Regular	54,568	396.3	33.0	61.2	5.5

<sup>1</sup> “Edu-poor,” a South Korean neologism deriving from the words “education” and “poor,” is a nod to the financial difficulties faced by families who spend a large portion of their income on their children’s education.

	2017				
	Total private education expenses (hundred million won)	Annual average private education expenses per student(10,000 won)	Monthly average private education expenses per student (10,000 won)	Private education participation rate (%)	Private education participation time(average time per week)
high school					

Recently, Korean-styled “open education” inspired from Japanese *yutori* education to eradicate the evil of private education is being grafted onto an “innovation school model” started to fuel innovation in public education in 2011. The current Moon government has pledged to expand innovation schools throughout the whole country as his main election promise by emphasizing on the state’s responsibility for education. Now, the innovation school model is operated at 1 164 elementary, middle, high schools in 14 cities and provinces, except Daegu, Ulsan, North Gyeongsang province. Why is the Moon government carrying forward such innovative schools, in spite of their fundamental problems: (1) anti-state education in the name of “people” and (2) decline in scholastic ability? In 2017, the nomination of some schools as “innovation school” foundered as a result of objections of school parents and students. A nationwide scholastic achievement test among school children in 2016 shows 11.9% of innovation high school students were placed in the “deficient” category – almost triple the national average (4.5%). According to Mr. Lee, a 49 year-old school parent who had sent his son to an innovation middle school, it was very difficult for his son to catch up with his school work after going to non-innovation high school. Furthermore, most innovation schools have a high proportion of teachers of the KTU in charge of innovation school operation program.

The extension of innovation schools is also the common pledge of left-wing education superintendents. The normalization of public education is the foremost task they are undertaking under the banners of experience study, nature education, and equality & community-oriented education. Most innovation schools neither require experience study expenses, nor school supplies, because almost everything students need is provided by each innovation school authority. Where does such overwhelming financial support for innovation schools come from? Being designated as innovation school needs the approval of more than 50% of teachers and school governors. If once designated with the superintendent’s permission, they can receive one hundred million won per year. This means that the financial source they enjoy is based on “taxes” (educational budget) that can be allotted into non-innovation schools. Even though left-wing superintendents and high-level public educational officials put

enormous budget of ten billion won into innovation schools, many of them show their “duplicity” not to send their own children into such innovation schools which have become synonymous with the decline of academic performance.

Like a “paradox” where left-wing economic policy for indigent people gets them in trouble far from reducing income polarization, left-wing education policy is also counterproductive. As the final outcome, children from low-income families are the biggest losers whose opportunity for upward social mobility is cut off, as a result of marked decline in their scholastic ability and poor accumulation of human resources. Faced with growing distrust of most school parents about more than 1 000 innovation schools all over the nation, left-wing superintendents attempt to adopt a new evaluation system capable of estimating the imagination and creativity of students. They come out with a plan to change old evaluation criteria, like moving the goalposts for being goalless in football game! However, emotional ability, void of basic scholastic ability is not getting on in good shape. How to measure numerical values of human imagination? Under the education stuck in socialist hard-core mindset, children of low-income families are more likely to sink into a swamp of poverty without even knowing the reason. For example, dumbing down education means more people unable to think for themselves and challenge a government. So, poor school parents should not to be fooled by the beautiful slogan of “innovation” or “progress.” A majority of educational policies propelled by left-wing government are all relevant “universal welfare services,” but the nation’s finances giving priority to universal welfare and/or overusing pork-barrel politics are bound to be bankrupt, under the banner of educational socialism.

In the hope of enhancing the “fairness” of education or restoring the “social ladder” to move up, the Moon government promised to adopt the abolition of “educational discrimination” in hiring or in workplace settings (cf. adoption of “blind” hiring to remove undue discrimination), the fairness of law school admission test, and the extension of supporting students from disadvantaged backgrounds (at the college entrance exam), students with disabilities, students of multicultural families or students escaping from North Korea. But the hypothesis that the enlargement of educational opportunities to socially disadvantaged groups would promote social equality turned out to be false in 1960s. Therefore, the mission of Korean education is to liberate Korea from a downward standardization education, as a shortcut of retrogression.

## 2. Politicization of education with the left-leaning authorized textbooks

Under the authorized text book system, it is more likely to produce citizens with ideologically biased view of history, than to acknowledge more plural conceptions on history. The legitimacy of the Republic of Korea (ROK, or South Korea) is negatively described or even denied in many authorized history textbooks, while North Korean communist regime is favorably depicted, despite of North’s provocative actions against the South and their military despotism. In its new guidance for authorized

history textbooks to be used by middle and high school students from 2020, the left-wing government said it will change the definition of its national and political system from “free democracy” to simply “democracy.” The Ministry of Education also changed 1948 from being the founding year of the ROK to being the founding year of the government of the ROK.<sup>1</sup> Right-wing camps have contended that the removal of “free” from “free democracy” could lead to mistaken interpretations, such as “social democracy” or “people’s democracy,” whereas left-wing camps have insisted that “democracy” is a more neutral term.

For reference, Bruce Cumings has been known as “the left’s leading scholar of Korean history.” Cumings’s *Origins of the Korean War* translated into Korean and introduced in 1986 has great effect on the epistemological change on Korean contemporary history.<sup>2</sup> He asserts that the 1950-53 Korean War was a civil war due to deep-rooted class conflicts and the US government was responsible for starting this war. He likens the indiscriminate American bombing of North Korea to genocide. Cumings’s “revisionist” interpretation was enough for young Koreans under the repressive Doo-whan Chun regime to get excited. In such a period even hard to obtain research materials on Korean contemporary history, his revisionist view of history, well organized with the refined theory of “class conflicts” was unquestioningly accepted among Korean student activists and left-wing scholars. As a result, a recent study found that 69% of high school students think South Korea invaded North Korea in Korean War!<sup>3</sup> Because these students are indoctrinated with erroneous national sentiment and misdirected anti-American sentiment through authorized history textbooks written by their teachers of the KTU. Nowadays, we make an issue of Japanese history textbooks’ tilt toward the (far) right, but we don’t need to raise a question about the leftization of Korean history textbooks?

Injecting a lopsided (anti-foreign/anti-capitalistic) view of history into young students’ brain is no longer an education, but a discipline or a brainwashing. According to prof. Young-hoon Rhee, a member of the Textbook Forum of the New Right Party, young historians with the ardent “popular view of history” obtained the right to write historical textbooks, and their “cultural power” was more consolidated with the enforcement of authorized textbooks. The original aim to adopt the authorized textbook system was to improve the quality of history textbook (designated as an “elective subject” at that time) through the competition of various textbooks, and to present a variety of views on history to students. However, more than 90% of authorized textbooks are written by left-wing writers and the content of any textbook they wrote is one-sided and monotonous under the shadow of socialism.

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<sup>1</sup> Regarding the changed definition of the modern nation’s founding, the ministry explained that clarifying August 15, 1948, as the day of the foundation of South Korea’s government is meant to respect the legitimacy of the provisional Korean government set up during Japan’s colonial rule in 1919 and the history of Korea’s independence movements.

<sup>2</sup> Bruce Cumings, *The Origins of the Korean War* (2 vols), Princeton University Press, 1981, 1990.

<sup>3</sup> A North Korean invasion of the South is an established historical fact.

Even they joined forces to kick one right-leaning textbook by Kyohaksa publishing out, because the latter is ideologically different. They already paid attention to the creative power in human consciousness. Because they know well the decisive role of human consciousness (super-structure) in the change of sub-structure: that is, in the transition from capitalist society to socialist paradise.

#### **IV. Conclusion**

Public education plays a pivot role in Korean education, but it faces a serious crisis because of disruptions in classroom, remarked drops in scholastic ability of students and loss of teachers' authority, etc. The causes of collapse in public education come from (1) distrust of school parents, vis-à-vis the public education based on "standardization policy" that makes "educational excellence" difficult and leads to "downward leveling," despite of its initial positive effects, (2) national college entrance system which shows how often it is changed by educational officials, according to left or right-wing government propensity, (3) relatively low-grade education system in comparison to other OECD countries and top-down management system controlled by schoolmaster and educational officials, and finally (4) too much politicization of Korean education.

"A bird flies with two left and right wings." It's the title of the essay published by Korean left-wing scholar Young-hee Lee in 1994. According to him, we Koreans have been living for over half a century after liberation, under a delusion that right-wing is sacred, but left-wing is evil. He denounced blind anti-communist and reactionary ideas, as remnants of the Cold War era prevailing in South Korean society. Thus, this phrase is a representation of extremely right-leaning Korean society according to him. But now the shoe is on the other foot. Ever since this left-wing government came to power, the phrase has become the catchphrase of right-wing opposition party. Right-wingers insist bird can fly longer with an appropriate balance of two wings and politics too. There is no future for a country tilted excessively to the left.

Leftization of Korean education has been ongoing for many years, so Korean education moves to the left without break. As you can see in the case of a high school student who took to the streets to protest against "state-designated" textbooks (you can also find her on YouTube video), our education field is an arena of opposition between left and right-wingers, and between teachers of the KTU and non-KTU. There are three main objectives at which left-wingers are aiming: (1) seizure of public education, (2) control on the management of private education, without regard to the infringement on private property rights and (3) "human remolding" by education. Under the slogan "putting humans first," they have been trying to create new human races who are anti-American, anti-Japanese and pro-North Korean to reproduce huge "left-wing groups" armed with anti-liberalism, anti-market economy sentiment through left-leaning education.



To my way of thinking, Friedrich Hayek in *The Road to Serfdom* (1944) best sums leftism/rightism up by considering the former as “planning” or “collectivism,” and the latter as “liberalism ” or “individualism.” Those who control ideologically-divided Korean peninsula are “planners” who plan everything for the benefit of many. However, their plan is based on totalitarian ideology to deny individual freedom itself. To propel their plan they need large popular groups’ support; therefore, planning and collectivism are, inevitably, two sides of the same coin. In general, these “popular groups” they need to seize power are not an aggregate of highly refined, educated individuals, but non-creative and non-independent people on the basis of numbers. The latter is vulnerable to political propaganda, easily fooled by rumors (fake news) and prey for emotional instigation. This public is large human resources to inflate the size of totalitarian party. Why do “our planners” spend money (from “taxes” paid by us) freely to unspecified mass people? Under the political-patronage tactic to gain votes, people tend to lose capacity to make their own way. Don’t you agree that young people with infinite potentials for being future Steve Jobs or Mark Zuckerberg become lethargic “slaves” by receiving one million won per year as a gift? This is really a dreadful dystopia! Political philosophers like Tocqueville or Lord Acton warned socialism means slavery. Free democracy is fundamentally based on individuals or individualism, and it is irreconcilable with collective socialism which is proved “retarded,” through the failure of communist countries of the 20th century. For example, China and North Korea claim to stand for people’s democracy, but they are nations of deformed bureaucratic “state capitalism” where the totalitarian state systematically exploits workers and people in fact, as the greatest capitalist who controls all modes of production

To conclude, let’s come back to the problem of historical textbook between two camps, in relation to the leftization of Korean education. As mentioned above, it started with the law revision from state-designated to authorized textbooks of elementary, middle and high schools by the left-wing Moo-hyun Roh government in 2005, in order to seek “diversity.” Diversity is a virtue to win the highest praise in the period of cultural relativism, but the diversity itself has not an absolute value. Since the enforcement of authorized textbooks, many younger scholars have taken part in writing history textbooks. They were specialized in Korean modern and contemporary history in a heyday of “popular view of history” in 1980-90, so the popular view of history (民衆史觀) becomes a political hot potato. For that reason, the controversy of textbooks is often considered to be the opposition between popular and non-popular views of history. These “popular” historians (民衆史家) apply one schematic Marxist historical materialism to Korean history, like a Procrustean bed: from primitive communism into ancient slavery, medieval feudalism, modern capitalism, contemporary socialism and finally future-oriented communist society. This stereotyped social developmentalism is not only a normative frame in writing Korean modern and contemporary history, but a theoretical basis for revolutionary strategy. Surprisingly, young students learn Japanese colonial rule

(1910-1945) or history of the Korean independence movement, in the way popular historians/left-wing activists read history as class struggle. So, students think the U.S Military Government in Korea (1945-1948) after liberation was another form of imperialistic invasion, so they consider ROK (South Korea), as a colony of American imperialism. Here, romanticized people (民衆) are the main subjects of liberation from oppressive imperialism. Popular historians divide all social classes into two categories: (1) workers, farmers and socialists and (2) Japanese/American imperialists, landlords and capitalists. The class struggle between two opposed groups can be solved only by a communist revolution. This linear pattern of popular view of history is very similar to that of *Juche* view of history in North Korea. As long as left-leaning “authorized” textbooks are used in classroom by teachers of the KTU, there are high probabilities of incessantly reproducing young generation with socialism-friendly attitude. According to teachers of the KTU, “the question is always with capitalism, and the only answer to this is socialism.” But socialism is a fraud for exploiting people using “unreachable socialist dream” to bait the hook. The writers and teachers of authorized textbooks speak up for “diversity” as an icon of the era. Thus, they seem to be leaders of relativism in appearance, but they are renegades of relativism by absolutizing diversity. In fact, diversity is long gone in the Korean academic world dominated by the great majority of popular historians. So, a right-wing opposition member says 90% of Korean historians are left-wings.

In Korea, the problem of historical interpretation is no longer the exclusive property of historians. According to Prof. Chul-hong Kim, it's not a debate among scholars, but a “war of culture,” because Korea had a war due to ideological difference. After Korea's liberation in 1947, South Korea choose free democracy and free market system, while North Korea, people's democracy and planned economy denying the right of private property. This ideological war escalated into Korean War (1950-53) that ended with the armistice, not a peace treaty, leaving the Koreas technically in a state of war. The Korean War was not a war where Korean people fought each other on behalf of US and Soviet Union, but an internal war free democracy vs. people's democracy. And this war is currently underway in South Korean society, with remaining unsolved conflicts between two camps. The existence of authorized text books is living proof that there are people who claim to change regime into people's democracy by denying the current free democracy and market economy. The problem of leftized textbooks is a war of culture. So, it's necessary to regain the cultural hegemony from those immersed in left-wing ideas deeply rooted in Korean art, culture and education, to win this one-hundred-year old cultural war adjusting a balance of two wings.

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## Issues of Special Education in Romanian Schools

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### Abstract

School managers, teachers, students, as well as their parents are faced with increasingly frequent attempts to integrate the diversity of pupils as a result of integration policies at national and European level. Educational needs of impaired persons require special attention. It is necessary to make steps should be taken to ensure access to education for each category of disabled person as part of the education system. Legislative framework in the field of special education Romania takes into account the legislation created by the international bodies on the education of persons with special educational needs, to which Romania has adhered. This paper presents aspects regarding the organization of educational support services dedicated to children, students and young people with special educational needs in mainstream schools in accordance with Romanian law; it also underlines the international legal framework of reference. This paper is part of a wider project that focuses on teacher training to optimize the integration of SEN pupils into the mainstream school; we used data collection methods, such as social document study and focus-group. An integrated and tailored approach is needed for children with SEN (special educational needs); focus-groups organized with primary school and gymnasium children, as well as with support teachers, revealed a number of adaptation issues from both sides (pupils with SEN and students with no problems). On the other hand, the itinerant teachers are assaulted by a series organization problems and it becomes impossible to provide support and assistance to children with special needs who are growing in numbers. Training of teachers is one of the most important pillars in the integration of all those involved in education, it is the way to optimize service organizations. Teacher training must respond to the real and complex needs of the beneficiaries, based on exploratory learning. In the final, will be presented and analyzed the main important problems faced by both teachers and pupils in the current educational context.

**Keywords:** special education, educational needs, integration policies, children, teachers

## **Introduction**

In any democratic society, every individual's right to education is unquestionable. However, there are categories of people who do not have open access to education. Moreover, this right is limited and difficult to obtain. This category includes children with disabilities, with special needs, children who, like typical children, have desires to learn and to achieve success in their lives.

The legislative framework in the field of special education in Romania takes into account the legislation created by the international bodies on the education of persons with special educational needs, to which Romania has adhered. Romania has produced several legislative documents in line with key international documents on the education of children with special needs since the mid-1990s.

In Romania, the right of these children with Special Educational Needs (SEN) to integrate into mass school (Law on Social Work, No. 292/2011, Law on The Protection and Promotion of Disabled Persons Rights, No. 448/2006, Law on the Protection and Promotion of the Rights of the Child, No 272/2004). These children are supported by teachers who are specially trained to work and adapt the curriculum to the skills of every disabled child. All students participating in the educational process, especially those with CES, should benefit from educational differentiation as they feature different abilities and different interests, they come from different social backgrounds and exhibit different affective behaviors (shyness, emotion), they have individual learning potential and different learning styles and methods.

The present article will describe a part of the PION project, (The itinerant-pawn teacher of integrating students with SENs into mainstream schools), a research project aimed at implementing a continuing professional training program for itinerant teachers. Such a training program was extremely welcomed by itinerant teachers, given that it was the first continuous training program, a pilot project for Brasov County.

We will describe the documentation for the training program, the research methods used in the initial evaluation and a part of the implementation of the training courses of the itinerant teachers.

## **Theoretical framework**

Studies on disabilities distinguish the concepts of impairment, disability and handicap (WHO, 1980; Gherguț, 2001).

Thus, impairment means any loss, anomaly or disturbance of anatomical, physiological or psychiatric structure or function.

Disability means any lack, reduction or loss of ability to perform an activity under the conditions considered normal for a person.

Handicap means any disadvantage suffered by a person as a result of a deficiency or disability that prevents or limits the total or partial satisfaction of the tasks considered normal for a person (depending on age, gender and various social and cultural factors).

Some authors make a distinction between the terms according to the way of addressing the issue of people with special needs (Gherguț, 2001, p. 12). Therefore, from a medical point of view, we talk about impairment, according to the functional aspect we talk about disability, and from a social point of view, of handicap.

One of the changes in recent years is the transition from handicap, better understood in the medical sense, to disability, which has a more relevant social component. The notion of disability is broader and also includes the social role of the person with impairment or disability, being disadvantaged compared to other people in the concrete case of the person's interaction with his/her specific social and cultural environment.

Thus, WHO, in 2001, defined disability as a generic term for deficiencies, limitations of activity and participation restrictions and revealed the negative aspect of the interaction between individual and society.

However, the most comprehensive definition, and perhaps closest to reality, was given by the United Nations in 2006 at the United Nations Convention on the Rights of Persons with Disabilities: disability is an evolving concept and it results from the interaction of people with disabilities and attitudinal and environmental barriers that prevent their full and effective participation in society at a level equal to other people.

Statistics show that around 10% of the world population is estimated to be dealing with disabilities (WHO, apud Yeo, 2001). However, at the level of Romania there are 742,353 (3.63%) adults with disabilities, including 63,300 children. Also, at the level of Brasov County, the rate of people with disabilities is 2.97%<sup>1</sup>

One of the greatest risks that this population may face is poverty (Yeo, 2001), especially due to social discrimination and the inaccessibility of people with disabilities in education. Disability can lead to discrimination, marginalization and, ultimately, to social exclusion by being perceived in relation to social barriers which deny the opportunity of employment for people with disabilities (Burke, 2008). Moreover, people with disabilities are "considered to be one of the social categories at high risk of multiple social exclusion" (Lazăr, 2009, p. 206), with disastrous consequences at individual, family and societal level.

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<sup>1</sup> (<http://anpd.gov.ro/web/transparența/statistici/trimestriale/>).

Studies conducted by UNESCO show that in developing countries only 1-2% of children with a certain deficiency receive education, boys being more often the beneficiaries of education compared to the female population.

However, in developed countries we see improvements in equality and in the removal of barriers of any kind meant to increase participation of people with disabilities in schools and society.

As stated before, when talking about disability, we have two ways of approaching this concept, accepted by specialists: the medical model and the social model. (Manea, 2006).

The medical model emphasizes individual loss or disability, due to a medical problem, considering that the difficulties of people with disabilities are due to their biological and psychological inferiority. According to the medical model, the problem of disability is related only to the person concerned, who is inactive due to his / her deficiencies and who needs medical interventions in order to recover the necessary skills to adapt to environmental requirements. One of the moral dilemmas that arises is that of other people's interventions, which are usually without disabilities, in the lives of people with disabilities. They can decide, for example, what school a disabled person should attend, what kind of support he or she should receive, where he or she has to live, whether or not he is allowed to reproduce (Campbel & Oliver , 1996).

On the other hand, the social model comes with a humanistic perspective in understanding disability, taking into account the social environment in which disability manifests itself. The model blames society when it comes to incapacity and disabilities of a person with a medical problem. Manea (2006) considers that "interventions focus on the environment, aiming at the elimination of restrictions, barriers that impede the participation of people with disabilities in various aspects of social life" (p.2).

Beyond the "treatments" proposed by the medical model, which focuses exclusively on impairment and disability, the social model takes into account the client system, with all the interactions between the person concerned and other people, organizations, and society.

The disability theories attempt to explain the phenomenon and to bring understanding in its approach by society. Thus, one of the most well-known theories in the area of disability is the social model of disability discrimination based on the disability paradigm (Pfeiffer, 2001; Barns & Oliver, 1993). This model suggests that the study of experience of people with disabilities focuses on several variables that have negative effects on disabilities and interact with each other as well as other human characteristics. In the field of disability studies there are at least nine interpretations or versions of the disability paradigm: the social constructionist version as found in the United States; the social model version as found in the United Kingdom; the impairment version; the oppressed minority (political) version; the

independent living version; the post-modern (post- structuralist, humanist, experiential, existential) version; the continuum version; the human variation version, and the discrimination version. (Pfeiffer, 2001, apud Pfeiffer, 2002).

Another explicative theory of the phenomenon of disability is symbolic interactionism, through Bordieu, who brings forth the concept of habitus and the understanding of the body as a bearer of value in society. The body and its social location are interdependent and body control is essential to obtaining status and distinction (Bourdieu, 2000).

In this theoretical and legislative context, there are several strategies for people with disabilities.

Thus, we have the European Disability Strategy 2010-2020<sup>1</sup> whose overall objective is to provide people with disabilities the opportunity to enjoy full rights and to participate in European social and economic life. To achieve this goal, eight main areas of action have been identified: accessibility, participation, equality, employment, education and training, social protection, health, and external action.

Another strategy was adopted in 2015, namely the national strategy "A barrier-free society for people with disabilities" ([http://www.mmuncii.ro/j33/images/Documente/Proiecte\\_in\\_dezbatere/2015/2015-10-08-proiecthg-strateg-diz-anexa1.pdf](http://www.mmuncii.ro/j33/images/Documente/Proiecte_in_dezbatere/2015/2015-10-08-proiecthg-strateg-diz-anexa1.pdf)) which aims at employment and accessibility of disabled people to an inclusive work environment, while ensuring access to support services to increase employability.

We must note that all the strategies lead to one common goal: the education and social integration through education of people with disabilities.

Studies point out that people with disabilities are disadvantaged and marginalized in the labor market in all European countries, a fact which is reflected by lower participation rates, higher levels of unemployment and lower levels of education than the rest of the population (Greve , 2009).

Inclusive education is defined as the type of education open for all children, starting from kindergartens, schools, training centers to universities and other educational systems.

The education of children with special educational needs should be in line with their development needs by properly assessing the learning / development potential and by ensuring rehabilitation - recovery and compensation for learning deficiencies, disorders or difficulties. Inclusive education involves individualized learning, which means selecting those strategies and learning tasks that facilitate the student's learning progress, also enhancing individual resources, depending on age, individual needs, pace of development, learning style and type of intelligence.

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<sup>1</sup> (<https://eur-lex.europa.eu/legal-content/RO/TXT/PDF/?uri=CELEX:52010DC0636&from=LV>)



Inclusive education is an alternative to special education, which allows child support services to provide real opportunities for recovery and reintegration for children who would have otherwise been targeted by special schools. For school and social integration of children with SEN, holistic, multi-level action should be taken, at the biological, psychological, and social levels. Also, it should not be forgotten that inclusive education is a circular relationship between school, family and community.

### **Methodological framework**

This paper is a part of a broader project that is centered on the theme of the itinerant teacher-pawn integration of pupils with SEN in mainstream schools and it presents aspects regarding the organization of educational support services for children, students and young people with special educational needs in mainstream schools in accordance with the Romanian law.

Our project meets the needs of the local community, taking into account that managers, teachers, pupils and parents, all are increasingly confronted with the diversity of the types of integrated pupils as a result of national integration policies.

The training of teachers is one of the most important pillars in the integration of all those involved in education, being a way to optimize service organizations. Teacher training must respond to the real and complex needs of the beneficiaries, based on exploratory learning.

The overall objective is to develop a training program involving exploratory itinerant teachers, coherent policies for national and European social development in order to optimize the integration of pupils with SEN in mainstream schools.

The specific objectives are: to identify the perceptions and attitudes of school managers, teachers, students, parents and various local community representatives on the integration of children with SEN in the mainstream school.

Designing a training program for itinerant teachers; impact analysis and monitoring itinerant teacher training program.

School managers, teachers, students, as well as their parents are faced with increasingly frequent attempts to integrate a diversity of pupils as a result of integration policies at national and European level. Educational needs of disabled people require special attention. It is necessary to take steps to ensure access to education for each category of disabled person as part of the education system.

Regarding the methodology, we used data collection methods, such as social document study and focus groups, on the one hand with specialists like the itinerant teachers, but also with indirect beneficiaries, pupils aged between 10 and 14 years.

An integrated and tailored approach is needed for children with SEN (special educational needs). Focus groups organized with primary school and gymnasium children, as well as with support teachers, revealed a number of adaptation issues

from both sides (pupils with SEN and normal students). On the other hand, itinerant teachers are assaulted by a series of organizational problems and it becomes impossible to provide support and assistance to children with special needs who are growing in number.

In the following, we will present the results of the SWOT analysis of the Itinerant Teacher Training Program, developed following the analysis of the qualitative data described in the methodology.

### **Findings and discussions**

Related to our project we had a workshop attended by a large number of itinerant teachers (about 30). The participants worked in teams and conducted some SWOT analyses on the socio-educational system of children with SEN in Romanian schools.

The discussions proved to be amazing and lead to some very interesting conclusions.

The SWOT analysis revealed that the teachers unanimously appreciate the existence of a well-established legal framework regarding the access of children with SENs to mainstream schools in mass school. By integrating children with SENs, they have models, they copy the behaviors from other children and thus gradually learn to behave and adapt to everyday life.

Itinerant teachers consider that the existing Romanian legislation is in accordance with the needs of children with SENs, thus benefiting from financial support.

They also consider that there is a specialized human resource, even if there are not enough itinerant teachers, but the professors unanimously stated that working with these special pupils is a very rewarding experience.

The professors appreciate the existence of a curriculum and an evaluation method adapted for pupils with SENs.

The discussions revealed that itinerant teachers working with children with SEN built a long-lasting relationship both with them, and with their parents.

The participant at the focus-groups acknowledged that there are many Romanian NGOs which support children with SENs.

The itinerant teachers consider that the existing Romanian legislation is in accordance with the needs of children with SENs.

The itinerant teachers have underlined that a strong point is also the fact that there are training programs to specialize them in the specific problems of children with SENs.

The WEAKNESSES mentioned by the itinerant professors were as follows:

The reality shows a high number of children with SENs and on the other hand an insufficient number of teachers who have limited time (just one hour) to deal/counsel one child per week.

Even though there are a lot of itinerant professors enrolled in working with children with SEN, there is however a general lack of human resources, for instance, a lack of specialists in speech therapy, physiotherapy and so on. The professors believed that the reduced number is due to the low number of candidates on the one hand, but also due to the low interest in working as a teacher (the salary being quite small in the budgetary Romanian system).

Another important aspect stressed by the itinerant teachers is the necessity of a better involvement of the team of specialists in the evaluation process of the children with SEN for a correct framing (and not by IQ tests).

Unfortunately in the Romanian mainstream school there are still teachers in mass schools that do not understand the importance of working differently with children with SENs and they ask for the same demands and common evaluations with the other pupils from the mass class; still, those professors see the SEN pupils as "a burden" for the entire educational system.

Another weak point would be the need for curricular adaptation depending on the level of children's ESCs, having regard that at present teachers have to explain what they teach in mass schools and do not have a separate curriculum; in other words, the purpose of the education should be focusing on the perception of children with SEN.

It is obvious that at the Romanian national level, there are no subjects adapted to pupils with ESCs, for example, at the Baccalaureate exams, pupils with SEN extra time to solve the problems and they have the possibility to be supported in writing if they have vision problems.

The focus-groups revealed that there is a lack of equipment and material resources especially in schools in small towns and also a lack of training for school principals as well as for teachers in mass schools for them to better understand the particularities of pupils with SEN and to better integrate them.

The SWOT analysis pointed out some opportunities such as services free of charge for children with SEN and the emphasis on the individualistic strategies which is in the benefit of children with SEN. During that past few years, many projects have been registered and NGOs came to meet and integrate children with SEN while also offering complementary services. The itinerant teachers appreciate the importance of workshops, training courses and conferences dedicated to these children with issues, although they seldom take place in Romania.

Over the last decade, Romania harmonized internal regulations and now there is a comprehensive legal framework in matters related to the European legislation, but also international legislation which protects the rights of these special children.

Finally, the main important threats resulted from those focus-groups are as follows: Many pupils with SEN drop out of the school and hence, there are little chances of adaptation and integration into society of those in the next future. On the other hand, because of these children's drop-out, future adults can become a real danger to society.

The reality shows that the special education system in Romania isn't focused on the products of the activity. Frequently, children with SENs have to repeat the classes because they cannot even read or write and eventually they abandon school.

The itinerant professors admitted that some repeated transfers between schools have been registered because these pupils with SEN are not accepted by the pupils in the mainstream schools or by the teachers. They cannot integrate themselves and they do not feel comfortable thus, dropping out of mainstream schools.

The same itinerant professors recognized that there is some confusion among teachers about the role of the itinerant teachers (for example, curricular adaptation), their job description.

Another vulnerability is related to the reduced professional integration of these children with SEN at the end of the school, usually, employers avoid to hire them because of the less level of performance in the companies, although they may have some substantial tax breaks.

## **Conclusions**

As we previously mentioned in the theoretical framework, the approach to inclusive education must be an integrated and holistic one that embraces the individual, one's family, one's community, and society.

We notice that the educational system for children with disabilities is still in development. If at the legislative and institutional level, things seem to evolve and work, we cannot say the same about applying inclusive education. There are still barriers, regarding the individual, families, communities, as well as organizational barriers.

Unfortunately, nowadays in Romania, pupils with SENs have a "tolerated status" they do not fully benefit from the idea of inclusion in its true meaning.

Teachers we have spoken to stressed that the change should occur primarily among teachers in their thinking and approach, so the prospects can be positive in terms of inclusion of these extraordinary children.

Family, parents have an extremely important role and they should be given the emotional support, besides the material one, that is not always so important.

Aside from the fact that these systems that need to work together in order to truly achieve inclusive education, there is a need for more training programs for itinerant teachers. The program described in the article is the first one in Brasov County. The

need for training for itinerant teachers is high and it is necessary to develop continuous training programs for them so that they can truly provide an inclusive education to children with SENs.

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# Education, Pedagogy and Literacies: Challenges and Horizons of Film Literacy

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## Abstract

The contemporary society has given rise to the profound need to introduce in the fields of pedagogy and didactics the work with literacies and the transmutation capacity of the teacher as a new actor in these themes, facing them as challenges that allow a more adequate formation in contemporaneity. Our aim is to reflect on the potential of teaching emerging literacies, based on studies on education and literacy, in order to update teachers for the 21st century, that is, with new skills that are now needed to deal with a new public, an information society increasingly full of data, platforms and languages. Between the most relevant literacies we find the film literacy that has a transversal, interdisciplinary and multicultural nature, as well as a double requirement: the knowledge of its identity as an autonomous matter of study and its teaching, allowing the transmission of semiotic instruments and tools, adaptable to different audiences and characteristics. Film literacy requires an axial place in Higher Education, along with other Literacies, in order to allow the acquisition of an adequate semiotic response to the ever more complex and omnipresent universe of information.

**Keywords:** education, pedagogy and literacies, challenges, horizons, film, literacy

## Introduction

### Literacies, Higher Education Innovation, Pedagogy

Contemporary society has given rise to a profound and inescapable need to (re) think the universes of Education and Pedagogy, namely the incorporation of Literacies in the teaching-learning process, increasingly marked by the generation of digital natives and the web 4.0. In fact, the stages of web 1.0, with the 1990s as background and the creation of corporate websites, static pages, access to information, but without user interaction or creation of contents as distinctive facets, web 2.0, with the organization of communities and the beginning of the content creation process, web

3.0, the semantic web, with the deepening of the processes of the previous stage are gone, we are now at the forefront of the web 4.0 stage, characterized by its organization, complexity, mobility, ubiquity and with young people in symbiotic relationship with progress and technologies. The great challenges of Education on the horizon for 2030 are clearly focused on acquiring the skills to understand and interpret the world, launching a prepared look and activating critical thinking for a more fruitful exercise in reading the times and the complex spaces of contemporary and citizenship, as referred to in the OECD report *The Future of Education and Skills*:

Education has a vital role to play in developing the knowledge, skills, attitudes and values that enable people to contribute to and benefit from an inclusive and sustainable future. Learning to form clear and purposeful goals, work with others with different perspectives, find untapped opportunities and identify multiple solutions to big problems will be essential in the coming years. Education needs to aim to do more than prepare young people for the world of work; it needs to equip students with the skills they need to become active, responsible and engaged citizens (2018, p. 5)

As a result of the technological progress and the emergence of children and youngsters, Prensky (2001) calls them Digital Natives, reflecting on these changes, and even classifies the 21st Century as the century of the Digital Society. These young people reveal new skills such as multi-tasking at the same time, a permanent exposure to ICT, and an ability to coexist with a variety of digital platforms and gadgets. These students, also known as Generation Y (1980-2000), Generation Z (2000 - 2010) and the current Alpha Generation (born after 2010) naturally lead (re) thinking to educational institutions, motivating a wave of pedagogical innovation that covers the teacher, the teaching-learning space-time and the profile of these new students, in clear combination with technological innovation.

This new student profile implies a new teacher profile, both being framed in a new educational paradigm, with technological challenges increasingly advanced and multiform. Digital natives, with their natural harmonization with technologies, which function as real extensions to read and interpret the world, with an ever-greater fusion of written, verbal, sound and image are a huge challenge for the teacher. In the same way that this new student shows an appetite for these platforms and technologies, a corresponding need emerges to provide the literacies to correctly encode and decode the information he receives and creates. At the same time, the teacher must follow these challenges, seeking, in the first place, the mastery of new literacies and their subsequent teaching as a tool to understand this new world. As stated in the report of the European Commission *The Changing Pedagogical Landscape: New ways of teaching and learning and their implications for higher education policy*, this is a joint work of Higher Education Institutions and teachers, which are essential in this process of change and should be supported in this appropriation of pedagogical innovation:



One clear message has come through the discussion about innovation pedagogies and technologies: carried out requires committed and informed teachers, and a prerequisite of that is that high quality teaching is valued by universities and by funders alongside research (Boyer, 1997) must either result in, or be accompanied by, appropriate reward and recognition systems for university teachers (2015, p. 17).

We are faced with a choice, an apparent dilemma: to accept the challenges of literacy or to be quartered in educational paradigms that no longer suit current society. Prensky (2001) argues that teachers who are in educational institutions and who are more than twenty years old are immigrants in cyberspace because they were born in a different context, having learned to acquire knowledge in a way different from that used by digital natives.

UNESCO (2013) advocates the essential contribution of teachers to ensuring that all citizens are able to access, evaluate and share information, as citizens with literacy skills contribute to the goals of sustainable development, better living conditions, employment, income per capita, gross domestic product, industrialization and development of a country's infrastructure. In short, literacies increase people's ability to work because they develop their skills, as Patidar says, quoted in the report. For UNESCO, teachers are at the heart of this issue:

UNESCO recognizes that teachers in service and in training are key players in building knowledge societies. In order to teach and prepare young people for tomorrow's world, teachers themselves need to be empowered, their needs addressed and supported. As UNESCO considers MIL an essential part of 21st century competencies, the MIL Assessment Framework intends to provide not only policy makers and decision makers and relevant educational planning and teacher training institutions with accurate and reliable data on MIL, but also to supply individual teachers with tools for self-assessment and self-improvement (2013, p. 38).

Moreover, UNESCO argues that the main benefits of literacies, namely informational and media, are as follows:

- Policy and decision makers, planners and professional institutions in the fields of education, information and communication supplied with valid and reliable data on existing gaps (in terms of environment and competencies), can initiate special interventions targeting teachers in service and in training.
- After assessment, teachers in service and in training will be better informed about their own level of competencies, and will seek and participate in special training programmes on MIL, in order to improve their teaching and learning and other areas related to their profession.
- Become more aware of the importance and usefulness of MIL for quality teaching and learning and will apply MIL in their classrooms and the training they provide (2013, p. 38).

As Santos, Scarabotto and Matos (2011, pp. 15843 - 15845) refer, the professional practice of the digital immigrant teacher is different from the way students look at knowledge and their production, which often leads to pedagogical inadequacy, such as example when criticizing their reading habits, but their communicational skills are unquestionable in social networks or multimodal platforms, where they move, read and write with perfect naturalness and competence. Thus, this society and these students take the teacher to the discovery and innovation that Guerreiro (2006) defines as the ability to see in another way the object that has already been observed by many, generating the need to be creative and innovative, changing paradigms in the teacher training and work processes, making them compatible with the profile of digital natives.

Faced with the vertigo of technological development and the consequences in society and in the course of growth of students, there is an urgent need to harmonize Education and Training in order to train teachers at all levels of education, including Higher Education, to respond appropriately to these technological challenges and to an audience deeply immersed in this ocean of technology, information and permanent mutation. As Caeiro points out, we can point to three levels of sociocultural change:

1. Today, knowledge and intellectual production are generally not exclusive to educational systems (school / universities):

- In this way, citizens are able to access more and more easily and with greater organization;
- The information put into circulation loses the control exercised over it by academic authority;
- The education system finds an active competitor in the new networks of knowledge dissemination - communication companies and Research Laboratories based in private business systems.

2. It increases the volume of information circulating in society, as well as its complexity and pace of innovation. Thus:

- The demand for knowledge is multiplied because the stability of knowledge has a short cycle of duration;
- The singular and personal "navigations" by the world of knowledge become possible and admissible - to each person their information;
- New and varied sources of knowledge are incorporated into the production structure of knowledge.

3. The logic of the organizational structures of knowledge is altered:

- The linearity that dominated the period of hegemony of the written medium disappears before the simultaneity and "mosaicity" that the electronic and the digital impose;

- The logic of time and accumulation is transformed. Knowledge is no longer grouped according to continuous temporal patterns, qualitative changes arise continuously and do not depend on the quantitative accumulation of information (Porto and Moreira, 2017, pp. 8-9).

In fact, to look at these challenges, we need new skills to know, understand, analyze, interpret, and produce. It is not enough to incorporate the technologies of the classroom, it is now more important to train for pedagogical innovation. In this context, it is absolutely essential that Literacies are a priority in this field. So let's identify our main challenges:

1. Understand contemporary society and the torrential exposure of information;
2. Know the profile of the native digital student;
3. To enable the teacher to respond to societal, technological and teaching-learning challenges;
4. Incorporate Literacies into the classroom, from the perspective of the student, but also from the teacher.

It is important to know the Literacies as sources and strategies of appropriation of the world and to understand it, with a plural approach, to the multiliteracies, to each of the Literacies, keeping in mind the context, the level of education, and the scientific area of teaching and research. In the present case, we intend to carry out a reflexive course on multiliteracies to the specificity of Film Literacy, since it has a transverse, multidisciplinary and multicultural dimension, constituting itself as an area of knowledge with its autonomous identity in its study and in its teaching, allowing the acquisition of interpretive, technical, narrative, aesthetic, among other skills, appropriate to various levels of education. We believe that Film Literacy deserves an axial place in Higher Education, not only in the training of future educators and teachers, but also in the training of Higher Education teachers. In fact, as noted by Moreira and Ferreira:

With the development of the mass media, especially the cinema, TV and video, the image has become a central element in the lives of men and an important vehicle for the diffusion of knowledge in the digital society. At a time when we live in a deep dependence on the image and in which it becomes increasingly necessary to develop a literacy around the reading of what is "seen", due to the civilizational inflection that constituted the substitution of the primacy of the reading of the text by the image it is important to understand the look, it is important to study the images and their meanings and signifiers, and above all, it is important to teach them to look and read the images (static and moving) (Moreira, J. and Ferreira, V., 2016, p. 7).

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In the context of Literacies, a first paradigm instituted the approximation between teacher and digital literacy as an initial bridge to associate them with pedagogical innovation. However, today, this paradigm proves to be insufficient to deal with the multiplicity of challenges of contemporary society, with a complex networking and an ever-increasing capacity to generate information on more varied platforms. J. António Moreira (Moreira, J. and Ferreira, V., 2016, p. 72) advocates a new paradigm that is characterized by the fusion of pedagogy and technology, promoting the development of multiliteracies, according to the multiplicity of channels of communication and respective forms of communication differentiated, citing Amasha, who advocates a pedagogical methodology through the development of multiliteracies, allowing the individual capacities of analysis in multimodal texts and even find new textual approaches.

Assuming this second paradigm as our preferred horizon, it is equally pertinent to look at the teacher in this 21st century. In this perspective, cinema will not only be considered as an ancillary tool associated with certain programmatic content, for illustration and rarely producing reflexive and critical repercussions, as it has often been in the past. In certain curricular units or disciplines, the film was used as a visual support of the literary work or of the subjects of the classes. Classic examples would be the use of *The Name of the Rose* to approach the Middle Ages, *The Maias*, *Frei Luís de Sousa* and *Amor de Perdição* to illustrate the novels in Portuguese Literature, *A Brilliant Mind* for the mathematical awakening, *Word and Utopia* to know life of Father António Vieira, among many others.

Cinema must be harmonized with pedagogy and didactics, being a resource, but also a scientific object of study. As such, it requires specific knowledge that only Film Literacy can provide. The teacher should thus know this literacy to transport it critically to his classes, motivating the student to the programmatic content, but also developing skills of film analysis, which would make this space-time a symbiosis of differentiated sources of information, enriching and by growing exponentially multiple potentialities of cognitive enrichment.

In view of this, we have identified the following premises: a) the teacher should seek the acquisition of Film Literacy skills, which awakens us to the training in this area of teachers of all levels of education; b) the student, in order to acquire competences in this area, at present, can only do so, by the end of secondary education, in very specific disciplines, in others in which teachers mobilize this literacy or in extra-classroom contexts; c) in Higher Education, the full conjugation between Film Literacy and

pedagogical innovation, excluding courses and curricular units associated with this area (Cinema, Audiovisual, Communication Sciences...), requires, once again, teacher training and pedagogical renewal. Already in 1995, Vitor Reia-Baptista asked:

Who transforms the teacher into a person interested in cinema, a shrewd analyst of cinematographic genres, a competent contextualizer, a connoisseur of history, techniques, theories and aesthetic currents, a decoder of intercultural, political, ethnic, aesthetic and poetic messages; in short, a skilled reader of the languages of the cinema and knowledgeable of the cinematographic art in all the amplitude of its dialects? (cited by Carlos Capucho in Moreira, J. and Ferreira, V., 2016, p.88)

This question refers us to another one to which it is associated: is there adequate training in Film Literacy available to teachers at various levels of education? When we think about the levels up to the end of high school, we can find examples close to Film Literacy in continuing education, formal and non-formal courses and the recent National Film Plan, a remarkable work for the Seventh Art, the creation of audiences and training specialized.

In university and polytechnic education, the acquisition of competences in the field of literary and film literacy, in particular, can be done, more broadly, through degree courses, short courses, workshops, using E and B -Learning models, MOOCs (Massive Open Online Courses), etc. But, in fact, we can conclude that it is urgent to invest in a thoughtful, systematic and broad way in the teaching of Film Literacy in Portugal.

The European Commission's Screening Literacy: Country Profiles report, aimed at assessing film literacy in Europe and the profile of each country, is a valuable contribution to this reflection, as it was based on the following assumption:

These country profiles are based on information provided by respondents to the European Film Literacy Survey conducted from January to June 2012. They focus on film education provision for school children and young people, and informal adult learners. Vocational and higher education provision is not, on the whole, reflected here. Unless otherwise indicated, film education is understood as developing critical and wider viewing; enjoyment; understanding of film language and of film as an art form and as a text; of popular, national and international cinema and film heritage; of different film forms or genres; and the development of filmmaking skills (2012).

In this 2012 report, Portugal presented the following facets regarding Film Literacy:

1. The absence of a national strategy for the teaching of Film Literacy;
2. The cinema is used in the various levels of teaching, as a playful instrument or associated with disciplines, as well as the production of films;
3. The contribution of the CineClubes is very relevant, mainly for the projects directed to the schools;
4. Several cultural associations actively collaborate with schools;

5. The Cinemateca has a very important mission and has developed courses and workshops for children and young people;

6. In formal terms, there are several courses on film, namely degrees, but on film literacy, in particular, only the work of the University of Algarve is known.

This diagnosis, although not very encouraging, is able to identify foci of training on Film Literacy, which came to be potentiated and that today they have gained a new élan.

In fact, in addition to the initiatives already mentioned, in particular the contribution of the CineClubes and the Cinemateca Portuguesa, the National Cinema Plan deserves particular attention, which is not yet covered by the European reports on this subject, created in collaboration by the Council Presidency of Ministers, through the Office of the Secretary of State for Culture, and the Ministry of Education and Science, by the Office of the Secretary of State for Basic and Secondary Education, in accordance with Order No. 15377/2013, published in the *Diário da República*, 2nd series, no. 229, of November 26, 2013, and operated by the Cinema and Audiovisual Institute (ICA), the Cinemateca Portuguesa - Cinema Museum and the Directorate General of Education (DGE). The National Film Plan is a program of film literacy and dissemination of Portuguese cinematography to the school public and offers instruments and contents, allowing the effective film analysis to be carried out, in conjunction with the support of various initiatives such as workshops, formations, cycles of cinema, among others, idealized by the schools that integrate the PNC.

Bearing in mind these valuable motivations, we would like to reinforce the need to think of film literacy as a factor of pedagogical innovation in Higher Education, quoting some of the key recommendations made in the European Commission's Screening Literacy: Executive Summary:

Recommendation 1:

Develop a series of **models of film education** for Europe, that include appreciation of film as an art form, critical understanding, access to national heritage, world cinema and popular film, and creative filmmaking

skills. We also recommend the adoption by EC of the revised definition of film education we use in this report:

**'The level of understanding of a film, the ability to be conscious and curious in the choice of films; the competence to critically watch a film and to analyse its content, cinematography and technical aspects; and the ability to manipulate its language and technical resources in creative moving image production'**

Recommendation 7:

Member states should promote partnerships between the film industry, education agencies, and government departments. Such partnerships should seek to ensure a

return in educational benefit from any investment of public money in film production. Support should include the provision of materials to enhance learning, and in particular: access to production materials (including production rushes); involvement of industry talent at events; and waiving of screening fees in a non-theatrical exhibition context.

Recommendation 11:

Member states should be encouraged to incorporate a film education component within initial teacher education programmes.

Recommendation 12:

The EC should provide online guidance on best practice in in-service training provision across the EU.

Recommendation 13:

The EC should investigate models for the collaborative provision of accredited training at M-level, for the widest range of film educators, using existing collaborative HE structures (2012).

If the European Union fully implemented these recommendations and Portugal as a member state applied them, we would have solid conditions to create a thoughtful, articulate, collaborative, innovative path with scientific and pedagogical support, technologically adequate and flexible, contributing to the consistent integration of film literacy in educational innovation environments, and in particular in Higher Education, developing critical thinking about cinema, training teachers and providing students with interpretation tools.

We consider that Portugal has already taken a very positive path in film literacy, but much more can be chalked up if we look at this opportunity with a strategic and systemic look. In view of the above, we would like to leave a set of working proposals, namely:

1. Address the challenges of contemporary society as an opportunity for pedagogical innovation in Higher Education;
2. Integrate literacy in a more incisive, systematic and profound way in Higher Education as transversal competences for teachers and students;
3. To broaden the possibilities of training and acquisition of skills in the area of literacy by the teachers of Higher Education;
4. To create synergies between Higher Education Institutions and the principal actors in the field of film literacy in Portugal, namely the Cinemateca Portuguesa, Cineclubes and the National Cinema Plan itself;
5. To favor the integration of literacies in environments of pedagogical innovation in Higher Education;

6. Contribute to the rapprochement between Higher Education teachers and literacy;
7. Contribute to the consolidation of the critical thinking of Higher Education students regarding the challenges of contemporary society by increasing literacy skills;
8. To foster film literacy in the environments of pedagogical innovation in Higher Education;
9. Enable the acquisition of skills on film literacy, in particular, to the teachers of Higher Education;
10. To provide students with the possibility of using film literacy for an exercise in critical analysis and interpretation of the current information, image and digital society.

We believe that this manifesto is connected in perfect union with the apology of pedagogical innovation in Higher Education and the contribution of the literacies that we have projectively finished. Moreover, looking at Higher Education as the club of living poets, we establish as our motto the title of this communication (Education, Pedagogy and Literacy: the challenges and horizons of film literacy), so that we can see the future as a clear and irrefutable symbiosis between the society of the 21st Century and the spaces of teaching-learning (formal and non-formal). On the other hand, we also choose the deeper meaning of the Greek word "poet" ("the creator"), in order to create new perspectives on pedagogical innovation, in this open, inspired and inspiring, daring and lively club, allowing each one of us to continue to tell your students, as did Professor Keating at the *Dead Poets Society*:

*Now in my class you will learn to think for yourselves again.*

*You will learn to savor words and language.*

*No matter what anybody tells you, words and ideas can change the world.*

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