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Editorial

A CRITICAL ANALYSIS OF NORTH-SOUTH EDUCATIONAL PARTNERSHIPS IN DEVELOPMENT CONTEXTS

Gerard Downes

This special issue of *Policy and Practice* was conceived with the intention of critically analysing the process of North-South educational partnerships in development contexts. Many Irish and Southern higher education institutes (HEIs) have, particularly in the past decade, invested heavily in educational partnerships for development, both in terms of finance and personnel, but also in intellectual and academic terms. However, there is a dearth of critical reflection and analysis on North-South educational partnerships, based on national and international experiences gleaned to date.

The importance of partnership is articulated in the Millennium Development Goals (MDGs), the eighth of which calls for the establishment of a global partnership for development. This prominence was later strengthened by the *Paris Declaration on Aid Effectiveness* of 2005 and the *Accra Agenda for Action* (2008). Steve Kayizzi-Mugwera (1998: 220) has described partnership as the ‘new big idea’ in development discourse. Yet this ‘new big idea’ has not been subject to the critical scrutiny commensurate with its standing.

Partnership as a burgeoning concept within both educational and research institutes has been generally heralded as having the potential to bring reciprocal benefits and mutual rewards to all parties involved in the process. Yet such examinations of the practice rarely involve an exploration of what ‘partnership’ actually entails, signifies and implies. In fact, so arbitrarily is the term ‘partnership’ utilised that its meaning is in danger of becoming undermined to the point of banality. The term ‘partnership’ has been used to describe a multitude of diverse collaborative activities, and has come to be used interchangeably with terms such as ‘collaboration’ and ‘link’ (Africa Unit, 2010: 9). In reality, the ubiquity with which ‘partnership’ is invoked means that

virtually any relationship between educational institutions, regardless of its scope, has come to be described thus.

The underlying aim behind this issue of *Policy and Practice*, therefore, is to bring together Irish and international experts in the area of educational partnerships in a collective effort to initiate a critical review of such partnerships and to consider how future planning and policy decisions, methods and performances, both nationally and internationally, might be improved in these fields. Concomitantly, this issue sets out to examine ancillary topics such as the principles of partnership, partnerships in practice, policy perspectives on North-South educational partnerships, and how an analysis of the above could inform future collaborative projects in the area of educational partnerships.

What is partnership?

As outlined in the Africa Unit's guide to good practice in educational partnerships (2010), the paradigm and discourse of partnership has, over recent decades, become dominant in the world of development cooperation as a reaction against the 'former' power asymmetry between North and South. This has resulted in a shift in perspective within development from the notions of 'external imposition' and 'prescription' to 'partnerships' in development cooperation. However, even after this shift has occurred, most of the educational partnerships undertaken posited a one-way flow of 'development knowledge' which reflects the dominance of Western models of development (Ibid.).

The concept of partnership, and particularly institutional partnership between educational and research establishments, is inherently complex and multifaceted. Indeed, the difficulty of defining what partnership entails in these contexts remains virtually elusive. There exists a high degree of normative or aspirational language to describe what partnership ought to entail, e.g. partnership should be based on 'shared interests' and 'mutual vision'; but how these interests are manifested may merely serve to exacerbate prevailing asymmetries in terms of power, resources and capacities among the partners.

Former Senegalese president, Abdou Diouf outlined his own normative vision of what educational partnerships ought to entail in a 1997

address to the Association for the Development of Education in Africa. He stated that:

“[T]he type of partnership we should promote cannot be founded on a vertical relationship based on authority, constraint, the imposition of an imbalance of power, substituted sovereignty and the transportation of models, or... paternalism and condescension. Instead, it should be founded on conditions such as authentic dialogue in a horizontal relationship in which the actors recognise each other as equals and participate in an exchange considered mutually useful and enriching by both parties” (cited in Boak and Ndaruhutse, 2011: 24).

Mindful of Diouf’s assertion, it may be salutatory to examine the respective motivations of those undertaking the educational partnership process. For instance, Jeanette Kuder, writing on the partnership process between educational institutes in the United Kingdom and Tanzania, opines that the terms ‘partnership’ and ‘ownership’ have been over-emphasised by governments and donors, ‘perhaps to hide the sense that a great deal of governance power is shifting in favour of donors and international agendas’ (2005: 173). She continues by stating that this practice ‘obscures the hard fact that un-elected non-Tanzanians are increasingly participating in the governance spaces and activities of making public sector policy decisions on behalf of Tanzanians’ (Ibid.). Elsewhere, Kuder stresses that international development targets ‘comprise a governance system that intrinsically advances the participation of non-nationals in the process of domestic public policy formulation, a participation that is often actively promoted – and hidden – by the term “partnership”’ (Ibid.: 168).

While Kuder’s analysis may, in some sectors, be dismissed as a cynical interpretation of the process, it should serve to highlight that the motivations governing involvement in educational partnerships often go far beyond the ostensibly benevolent reasons that some educational institutes proffer as explanations for their participation. Educational partnerships are often linked in to particular institutes’ internationalisation strategies and serve as a mechanism for joint research opportunities. Indeed, as Kenneth King stresses, ‘partnership is no longer a choice for Northern researchers wanting to work in

the developing world; it has become a condition of doing research in the South' (2008: 1). Partnerships, therefore, not only provide opportunities in terms of funding and access to resources, but they can also enhance the continuing professional development and training of staff in educational institutes.

Partnership and Development Education

One of the more salient definitions of partnership emanates from the Africa Unit, which suggests that partnership, in the context of educational and research institutes, could be described as:

“A dynamic collaborative process between educational institutions that brings mutual though not necessarily symmetrical benefits to the parties engaged in the partnership. Partners share ownership of the projects. Their relationship is based on respect, trust, transparency and reciprocity. They understand each other’s cultural and working environment. Decisions are taken jointly after real negotiations take place between the partners. Each partner is open and clear about what they are bringing to the partnership and what their expectations are from it. Successful partnerships tend to change and evolve over time” (Africa Unit, 2010: 18).

A cursory examination of such a definition may prompt questions about the relevance of North-South educational partnerships to the scope and coverage of a review whose primary remit is development education. Fiona Bailey and Anne Dolan may provide a satisfactory answer to this quandary, as they have detailed how development education has much to offer the concept of educational partnerships in terms of the former’s process, action component and conceptual framework. Additionally, development educators have recognised facilitation and inter-cultural skills as effective mechanisms for dealing with the negotiation of power relations. This is important in terms of a critical assessment of educational partnerships, they argue, because in order to move beyond the often vacuous rhetoric of ‘partnership’, it is imperative that partners openly address the issue of power in terms of ownership, decision-making, funding, planning and evaluation (Bailey and Dolan, 2011). As Jennifer Birkenhoff (2002) declares, the intrinsic power relations in

international development make it impossible to exclude power and power relations from partnership discourse and practice.

Furthermore, while partnerships are theoretically committed to collaborative relationships predicated on reciprocity and mutuality, this is far from the case in reality. Partnership processes could therefore benefit from adopting some of the systems of intercultural and development education in order to clarify expectations, assist in the creation of greater levels of mutuality, and develop basic cross-cultural communication.

Use of the term ‘North-South’

The term ‘North-South’ when applied in the context of ‘North-South’ educational partnerships is not utilised to delineate a strict geographical divide between countries and regions North and South of the Equator. Given that most of what we conceptualise as ‘the South’ lies geographically North of the Equator, e.g. much of sub-Saharan Africa; and that highly-industrialised countries such as Australia and New Zealand are located near to or below the Tropic of Capricorn, it would be simplistic to cast the great disparities in wealth and development as a quasi-Manichean struggle between two separate geographically-based polarities. Indeed, the use of binary terms such as ‘North’ and ‘South’ can be extremely problematic and lead to over-simplifications in the arena of educational partnerships and other related domains. In their Focus article for this issue of *Policy and Practice*, Fran Martin and Lynne Wyness seek to overcome this particular roadblock by emphasising how the terms ‘North’ and ‘South’ have a variety of meanings depending on the context in which they are used. For Martin and Wyness, therefore, both terms are used to represent a spatial distinction between countries that are globally located in the Northern and Southern hemispheres.

Use of dualistic language such as ‘North’ and ‘South’ should not blind us to the internal dynamics and disparities within the countries of the ‘global North’. In this context, it is salutatory to consider the words of Fiona Beals in her Viewpoint article which draws attention to many of the problems encountered in the use of labelling peoples as emanating from the ‘North’ or ‘South’. She declares that the Children’s Commissioner of New Zealand found that 25 percent of children in that country live in extreme poverty, yet such

children do not fit in to the ‘majority/minority’ world or North/South narrative as devised by development educators. Similarly, she says that while working with a group of Maori academics on a development education resource for the UK, the group were confused as the label ‘North’ had never featured in their cognitive framing of Aotearoa (the Maori name for New Zealand). As she later states presciently,

“the classroom (both formal and informal) is a contested and political space, and the language of labelling, coupled with the art of political correctness, often creates confusion for educators as those constructing development education resources jostle for dominance in terminology and change language without consultation”.

Introducing Issue 16

Some of the more acerbic readers of this issue might pinpoint that each article is composed by a member or members of only one of the institutional partners involved in the North-South partnerships featured in this issue of *Policy and Practice*. Although such a discrepancy was certainly not a deliberate ploy on behalf of any of the researchers or editors, it is perhaps indicative of how the partnership process in North-South educational contexts can, on occasion, be driven more forcefully and led by a single institutional partner, rather than being an egalitarian practice of equal input guided by mutual collaboration with reciprocal benefits for all the partners involved.

In the first of the Focus articles in this review, Fran Martin and Lynne Wyness present the findings of one strand of a three-year Economic and Social Research Council (ESRC) funded project which focused on the nature and development of two educational partnerships (involving organisations in Gambia and India) with a view to understanding the context they provide for annual study visits to India by UK student teachers, and bi-annual study visits for UK teachers to The Gambia. Martin and Wyness note that their intention was to map patterns across the two cases under review, and to relate the similarities and differences between them to their specific contexts. Their research intended to address gaps in the knowledge about whether study visits framed in a long-term global partnership lead to more meaningful and long-lasting changes in perceptions about what Edward Said termed the ‘Other’.

Their paper outlines how there has been a precipitous rise in the number of educational organisations developing North-South partnerships as a result of government education policy in the UK since 2000. Such partnerships and study visits, they maintain, are framed at a policy level within a neoliberal discourse, which is evident in the economic goal of maintaining the UK's position on the world stage. Using aspects of postcolonial theory to inform the research design and methods, Martin and Wyness also sought to identify and explore innovative participatory approaches to research between the global North and South, by working with the idea of 'Third space'.

Highlighting the possibility of potential bias from their own perspective as Western academics, Martin and Wyness nevertheless stress that the two organisations involved in one of the studies (Tide and NEA), from the outset discussed a shared goal of working together in ways that were underpinned by principles of mutuality, reciprocity and equality (themselves contested terms). The partnership contained an explicit focus on what ethical engagement constitutes in the context of a North-South partnership, and both parties were committed to work in ways which challenged what the authors term 'the neoliberal, donor-recipient patterns of relating which are common to many North-South educational partnerships'. Mutual learning was central to the Tide-NEA partnership, as such learning was perceived to be an alternative way of working and relating between the global North and South, and a contrast to more stereotypical media portrayals of that binary relationship. Stressing the fundamental importance of the intercultural encounter, the authors conclude that so often in partnerships the 'Other' is unwittingly positioned as an object of study, thus recreating aspects of the colonial mission and thereby doing little to support the development of ethical relationships which are necessary in achieving deeper intercultural understanding.

Gerard McCann's article examines the potential role for higher education institutes in micro-development strategies which aim to contribute to the generation of pro-poor economic growth and quality employment. He outlines how neo-functionalist mechanisms for integrating peripheral economies within the global market system are wholly inadequate in empowering local communities. Instead, by taking a broad survey of policy and practice, he looks at alternative models of poverty alleviation, focusing on community-sourced

initiatives and emphasises the potential role of community-linked institutions, such as universities, in providing a hub for micro-economic development in marginalised areas. Stressing that actions should be consensual and start with the beneficiaries before working upwards to intra-state and transnational actors, he states that micro-development can provide a mechanism to tailor investment and partnership in an empowering, regionally-based and socially-sensitive manner. Universities, he asserts, have a potential in micro-development support because of their proximity to communities that are attracted to this model of development and because of the resources that can be tapped into to stimulate local economic activity.

Peter McEvoy examines past and current experiences of higher education partnership approaches within the wider context of development cooperation with Africa. His article details the changes that have occurred in the arena of higher education and development and how Ireland's stance on these issues has altered as a result. He provides two case profiles, separated by an interval of over thirty years, to demonstrate how the interface between higher education and development assistance has evolved over this time. The two case studies in question, Higher Education for Development Cooperation (HEDCO) and the Irish-African Partnership for Research Capacity Building (IAP), show how Irish government support to higher education has been targeted and how it has changed significantly since the late 1970s and early 1980s. During the HEDCO era, assistance was focused predominantly on strengthening undergraduate teaching capacity, while recently the emphasis has shifted to graduate training, continuing professional development and strengthening research capacity.

McEvoy states that future aid programming should incorporate higher education and research capacity support as an integral feature within the broader aid effectiveness framework. Additionally, he asserts that Ireland's contribution in this arena should inform, and be informed by, shared intelligence among like-minded donors about what constitutes good practice. He concludes by stressing that nurturing institutional partnerships of medium-to-long-term duration should be central to a strategy for harnessing higher education and research in the service of development.

Jonathan Harle's article, which reflects on policy, partnerships and politics with regard to the strengthening of research in African universities, attempts to set partnership initiatives in the wider context of African higher education policy and funding. While Harle does not set out with the intention of interrogating the success (or lack thereof) of partnerships, or to problematise the idea of partnership itself, he does attempt to explore some dimensions of research capacity, an area to which partnership is often applied, and to locate this within wider debates. He shows that while educational partnerships will continue to play an important role in enabling African academics and their respective institutions to rebuild and re-energise their research departments, partnerships also bring with them normative ideas that in themselves pose new challenges. Concomitantly, as their engagement in international educational partnerships grows, African universities are becoming embroiled in debates and agendas determined by and for Northern higher education systems, which are not only substantially better resourced, but also respond to different social, economic and political demands and ideas.

This issue also contains two Perspectives pieces by Ronaldo Munck and John Olyphant respectively. Munck tackles the issue of Futures-oriented development research by focusing on a foresight exercise undertaken under the auspices of the IAP. Munck argues that the Foresight approach and methodology can provide a useful contribution to development research, particularly if it is genuinely partnership-based. Such a partnership-based approach can, he maintains, not only encourage dialogue across disciplines, but could also help to bridge the divide between researchers, practitioners and policy makers by providing a space for long-term thinking and visualisation. Additionally, the Foresight approach could assist in empowering Southern-driven research agendas and help to harness global development resources within higher education and research institutes. Nevertheless, he also cautions that Foresight could readily become yet another top-down 'solution' to development issues based upon the perceived superior knowledge of some of the institutional partners.

An assessment of international collaborative learning by Susan Cozzens and other researchers at the Georgia Institute of Technology (Cozzens et al., 2011) found that, despite the increase in international research

collaboration in recent decades, there is a dearth of focus in relation to the global 'South'. Indeed much of the research in this area utilises Immanuel Wallerstein's worlds systems framework, visualising the world as a system of cores and peripheries linked to each other by a network of unequal economic exchanges, characterised by inequality in terms of resources and capacity, in which such lack of resources, opportunities and information can be surmounted by collaboration with researchers in 'core' states. Given this dearth of focus on the partnership process in the global 'South', it is imperative for the purposes of this issue of *Policy and Practice* that a 'Southern' perspective be articulated.

John Oliphant of the Lesotho College of Education (LCE) in Maseru provides a critical examination of his institution's experience in a partnership based at Mary Immaculate College, Limerick, Ireland, known as the Centre for Global Development through Education (CGDE). This partnership also involved thirteen Irish third level institutions, one Ugandan teacher education institution, as well as the ministries of education in Uganda and Lesotho respectively. Oliphant finds that this partnership was one of the few meaningful ones embarked upon by the LCE, though not one bereft of difficulties. He emphasises how the partnership, while demand-driven, was weak in terms of planning for long-term sustainability and that comparatively little attention was paid to ancillary issues such as enhancing cooperation among the Southern partners in the process. Nevertheless, the partnership did engender a strong sense of ownership, responsibility and mutual belonging among its members, and could help to provide a template for how partnering for development with the South can be conceptualised, structured and managed.

As highlighted earlier, Fiona Beals's Viewpoint article explores the implications of development labels such as North/South in the Aotearoa/New Zealand education system. She argues that Aotearoa's discursive position within the 'North' has ramifications in the ways that power, relationship and identity are understood and played out in educational settings. Labels such as 'minority' and 'majority' have only exacerbated the prevalent confusion and have resulted in a disempowering of the players in the educational process.

Conclusion

As resources allocated to the development sector are beholden to ever greater scrutiny, a critical analysis of a central tenet of overseas development assistance, namely North-South educational partnerships, is necessary in order to demonstrate how collaborative teaching, learning and research at international level can be ameliorated in the arenas of policy and practice. The conceptualisation and practice inherent in educational partnerships raise many questions regarding the medium to long-term sustainability of the partnership process, the asymmetrical benefits which tend to accrue to partners from the process, the difficulties inherent in monitoring and evaluation, and the efficacy (or otherwise) of investing in educational partnerships. This collection of articles can be a starting point in the debate concerning the relevance and effectiveness of such partnerships and whether they can become self-sustaining, self-financing and mutually beneficial entities for participants in the medium to long-term.

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Focus

GLOBAL PARTNERSHIPS AS SITES FOR MUTUAL LEARNING

Fran Martin and Lynne Wyness

Introduction

This article presents the findings of one strand of a three year, Economic and Social Research Council (ESRC) funded research project titled ‘Global partnerships as sites for mutual learning: teachers’ professional development through study visits’. The project ran from October 2009 to January 2013 and had three main foci: first, to investigate the nature and development of two educational partnerships with a view to understanding the context they provide for annual study visits for UK student teachers to India and biannual study visits for UK teachers to The Gambia; second, to investigate the learning for all who participate in study visits, visitors and hosts; third, to investigate the impact of that learning on personal, professional and organisational practices over a period of time. The article focuses on the findings that inform the first strand, and in particular on the nature of the relationships that have developed and how the concept of ‘mutual learning’ is understood in each context.

Background to the research

As a result of government education policy in the UK, since 2000 there has been a steady rise in the number of educational organisations developing North-South partnerships. The rise has been particularly evident in schools, but also in other organisations with an education remit such as development education centres (DECs). As the number of partnerships has risen, there has been increasing awareness, both academic and practitioner-based, of the need for teachers and other educators to have deeper understanding of development issues in order to enhance global learning for their students.

Professional development activity that meets this need falls into two broad categories – training within the UK (such as was provided through the

British Council Developing Global School Partnerships programme¹) and 'study visits' to a country in the global South, which involves explicit intercultural encounters with the 'Other' (Said, 1985). There is a broad spectrum of experiences that could be included within the overarching concept of 'study visit' such as the 'study abroad' phenomenon in higher education (HE), international volunteer programmes, and long-haul geography fieldtrips. At school level increasing numbers of teachers are taking part in study visits, where there is an emphasis on learning about a different place and culture, and gaining intercultural experiences that serve to raise awareness of development issues.

Partnerships and study visits are framed at a policy level within a neoliberal discourse (Martin and Griffiths, 2012). This is evident in the economic goal of maintaining the UK's position on the world stage (DfES, 2004), and the Millennium Development Goals (UN, 2000) which are, in education, encouraging a focus on the eradication of extreme poverty (MDG1) and universal access to primary education (MDG2). Educational policy on global learning largely promotes these goals uncritically as being a 'good thing' (DfES, 2004, 2005), yet there is also a growing body of literature problematising such policies, showing that they can unwittingly lead to activities that are both exploitative and paternalistic (Hutchins and Smart, 2007; Martin and Griffiths, 2012).

Issues of power and representation underlie many intercultural learning programmes (Martin and Griffiths, 2012), and are masked by a discourse of enabling participants to become 'global citizens' – developing the skills to be successful in a globalised world and, in the context of education, preparing teachers to teach in an increasingly diverse society (Cushner and Brennan, 2007; Stachowski and Sparks, 2007). Looking at other contexts, in the United States (US) the 'study abroad' phenomenon has been criticised for

¹ Continuing professional development, both face to face and online, was provided under the Global School Partnerships programme until 2012. This then became part of the Connecting Classrooms programme. Online materials and activities are available at: <http://connectingclassrooms-learning.britishcouncil.org/>

'harvesting' resources and knowledge from Southern countries and using it to strengthen the country's political and cultural hegemony (Zemach-Bersin, 2007). In addition, the trend for intercultural experiences to be part of 'service learning' in North American contexts, points towards the provision of a service to the Southern country, with all the dangers of donor-recipient dynamics that that entails (Kiely, 2011). Similar concerns are being raised about service learning within the UK (Bamber and Hankin, 2011).

This discourse competes with that of developing students as 'global citizens' who are aware of their place in an interdependent world, and able to challenge 'negative and simplistic stereotypes' about the global South (DfES, 2005). However, research has shown that in many cases intercultural experiences can serve to reinforce existing stereotypes and beliefs (Hutchins and Smart, 2007; Disney, 2008; Edge et. al., 2009). There is a danger for teachers taking part in study visits that they return to the classrooms with stories that focus on what is lacking compared to the UK, rather than challenging the dominant discourse about the global South as poverty-stricken and in need of 'our' help. There is also a concern that these 'frozen narratives' (Said, 1985) are perpetuated through their teaching.

Very little research has been conducted into the impact of study abroad or study visits on teachers' worldviews, and none that we are aware of on the long-term impact of participating in such an experience. In addition, there is a lack of research bringing Southern perspectives to this area of work. Although the need for Southern voices has been recognised, these have yet to be genuinely included in global and development education. Finally, there are a number of study visits run from the UK that are framed within a broader educational partnership with an organisation in the host country. There is anecdotal evidence of the efficacy of such a long-term relationship on the potential for learning, but research has been limited and under-resourced into whether this is actually the case. This research has aimed to address these gaps.

Theoretical framing

Previous experience of participating in a number of study visit courses to The Gambia led to our interest in investigating the impact of the study visits in a rigorous and systematic way. On the basis of academic experience, Fran Martin

(2005) was aware of the deep-seated and implicit neoliberal discourse that underpins so much educational activity related to global citizenship and North-South partnerships. In the course that she co-led with a colleague at Tide~global learning (www.tidec.org) a key aim was to challenge this discourse and to model, through the partnership that helped to frame the course, alternative ways of relating North-South partnerships based on principles of mutuality and equity.

Since the Tide~ partnership was with an organisation in The Gambia (The National Environment Agency, NEA), it was hard to avoid the fact that the two countries have a former colonial relationship with a legacy that continues today (Abbott, 2006; McEwan, 2011). For these reasons, postcolonial theory was chosen as a theory that offers a suitable critique of the Western world, in particular of the knowledge systems that have come to dominate on a global scale. There is not enough space to go into detail here (for an excellent account of using post colonial perspectives in education research see Andreotti, 2011) so we limit ourselves to a brief overview of aspects of the theory that have proved particularly productive in the research.

Postcolonial theory has often been criticised as a destructive rather than constructive theory, in that it offers a means of deconstructing texts and activities and revealing the hegemonic, Western discourses that pervade them (Andreotti, 2011). While this is the case we have found, taking Andreotti's lead, two elements of postcolonial theory that offer 'actionable' alternatives when taken together: unlearning privilege (Spivak, 1990) and 'Third space' (Bhabha, 1994). Spivak discusses how, in order to unlearn privilege, one needs to go through a process of 'learning to unlearn', 'learning to listen', 'learning to learn' and 'learning to reach out'. When this is done through intercultural dialogue, Bhabha argues that often individuals occupy their own cultural space, even if in another spatial location, and that this can provide a barrier to understanding each other, due to the (usually unconscious) positioning based on one's cultural norms. He proposes that each in the intercultural conversation need to be prepared to step out of this space into the space between them, leaving cultural baggage behind, if learning from the dialogue is to take place. It is incumbent on both parties to do this and to create a 'Third space' in which new meanings, ideas and understandings can emerge. We will now describe the

project and discuss how these theoretical perspectives informed the research design.

Overview of the project

The research project had a dual focus that aimed to investigate: (a) the nature and development of two global educational partnerships (UK-Gambia, UK-India); and (b) the learning that takes place for teachers involved in study visits run by the two partnerships. With regard to the latter, the study visits are what we term study visit *courses*, or *supported* study visits, which have preparatory, study visit and follow-up phases and in which the learning is supported and facilitated by course leaders. A further aim was to gather data from both organisations involved in each partnership, and from both visiting and host individuals involved in the study visits. In this way we aimed to fill a gap in research in this area conducted from within the Western academy that privileges the activities and learning gains of those in the West.

The key research questions guiding the research were: what impact do two North-South study visits have on teachers' understanding of development issues? And how does this inform their understanding of, and practice in, global partnerships? They were investigated through a focus on the following supplementary questions:

1. How have two North-South partnerships developed and what context do they provide for educational study visits?
2. What do teachers from both North and South learn about development and global issues from their involvement in study visits?
3. What are the key factors that prompt any changes in knowledge and beliefs?
4. How does this learning inform their practice over time?

In a project of this nature, the methodology employed is pivotal. The four organisations involved had developed long-standing relationships based on principles of reciprocity and mutuality. In the early consultation with the

organisations, it was agreed that the research design had to mirror this, and that a researcher as an ‘objective observer’ was not going to be appropriate. We therefore adopted a collaborative, participatory approach (Bennett and Roberts, 2004) – which has been an attempt to ensure a voice for all partners in the research and to embody the right of research participants to influence how the research findings are portrayed. Due to the research design and methodology the research team has been engaged in ongoing critical reflexivity alongside the participants, as is discussed further below.

Table 1: Overview of research design and methods

Research question	Methods of data collection and research phase	Research sample	Researcher
	Phase 1		
1	Documentary analysis Semi-structured interviews.	Those in lead role in each organisation	UK PI Gambian and Indian research consultants
	Phase 2		
2 & 3	Multi-sited ethnography – participant observation, research diaries, semi-structured interviews pre, during and post study visit.	UK study visit participants	UK RF
2 & 3	Participant observation, research diaries, semi-structured interviews pre and post study visit, some focus group interviews.	Gambian and Indian hosts of study visits	Gambian and Indian research consultants
	Phase 3		

4	Questionnaire Follow-up focus group and individual semi-structured interviews	UK study visit participants between 2002-2009	UK PI UK RF
4	Questionnaire Follow-up semi-structured interviews	Gambian and Indian hosts of study visits 2002-2011	UK PI with Gambian and Indian research consultants

The research was conducted at three levels: strategic, pedagogic and longitudinal (Table 1). At the strategic level we investigated how two North-South partnerships have developed over a period of time, and the contexts they provide for educational study visits (Q1). At the pedagogic level we explored what teachers from both the North and South who took part in the study visits in 2010 learnt about development and global issues (Q2 and 3). Longitudinal data were then gathered to enable us to explore the ways in which the impact of taking part in the global partnership and study visits were enduring for both individuals and their organisations (Q4). The research team consisted of a UK principal investigator and research fellow, a Gambian research consultant and an Indian research consultant.

In addition to the research focus, we aimed to identify and explore innovative participatory approaches to research between the North and South, explicitly working with the idea of ‘Third space’ – focusing on the ‘inter’ of intercultural learning as the opportunities arose. For example, there has been a meeting of cultures between researchers and research participants, as well as between four researchers from three different countries. This has provided us with challenges of unlearning academic privilege when working in our own country contexts, of the UK researchers unlearning Western privilege, of striving to find alternative ways of working that do not put Western academy at the centre, and of the research team working knowingly together with a pedagogy of dissensus (Andreotti and de Souza, 2008). Although we have used

similar methods for data collection, how these have been developed and employed in the field has varied according to the local context. This contradicts some conventional research wisdom, that tools should be administered equally if findings are to be valid, so we have had discussions about what claims to validity we can make that are based on situatedness and complexity (Sharp, 2009) rather than trying to generalise across the project as a whole.

Learning from difference

When a research project is investigating contrasting global partnerships and contrasting courses there has sometimes been, when we are presenting our work to others, an expectation that we will be making comparisons that are evaluative and drawing conclusions that enable us to make recommendations to others about 'how to' ...develop a meaningful partnership/run a study visit course. However, the differences between the partnerships and courses are evident at so many levels and thus so numerous that any attempt to compare in this way would be meaningless and, we argue, unethical. This does not mean avoiding the differences and the challenging questions these raise for us; it means being attentive to what those differences are, the contexts within which they emerged and the ways in which they are expressed from a variety of perspectives. This approach is based on a relational ontology and, as we perceive it, keeping with the postcolonial teachings of Spivak and Bhabha (Andreotti, 2011; Martin, 2012).

Before presenting some of the findings it is therefore necessary to outline some of the differences that are found across the research site:

- Different country relationships: The Gambia and India are both former colonies of the UK, but have very different historical and cultural backgrounds and each related to the UK politically and economically in quite different ways.
- Different organisational relationships: the UK-Gambia partnership is between Tide~, a development education centre in the UK, and the NEA, a government department in The Gambia. The partnership developed out of a shared concern to support teachers' professional development around educating for sustainability. The organisations

have been working together since 1999 on a range of activities, which are centred on a biannual study visit.

- The UK-India relationship is between Canterbury Christ Church University (CCCU) in the UK, and Goodwill Children's Homes (GCH), a charitable organisation based in the UK that provides homes and schooling for orphans and semi-orphans in Tamil Nadu, southern India. GCH has an Indian management group and it is with this part of the organisation that CCCU has developed what they describe as a 'strong link', rather than partnership. Members of staff in the Education and Geography departments of CCCU and staff in GCH Tamil Nadu have been working together to coordinate and facilitate a yearly study visit since 2000.
- Two different models of 'study visits': Tide~ runs a seven month course from October/November – May/June. There is a selection procedure, preparation phase of three full-days (one a month) – based on reflective learning cycle, group forming, understandings of culture, and the idea of mutual learning. This is followed by a week-long study visit to The Gambia, which entails a range of activities planned with the NEA including joint fieldwork with Gambian teachers, cultural activities, and a day conference at the NEA. A follow-up phase consists of two further days and the opportunity to contribute to Tide~'s annual conference in June.
- CCCU runs a three-week 'supported study visit' (not part of the formally accredited work of the university). There is a selection procedure, and a preparation phase in the spring that focuses on organisational aspects of a study visit. There is a three-week visit to Kerala and Tamil Nadu. The first 3-4 days spent in Kerala act as a preparatory and orientation phase. The group then travels to Tamil Nadu and spends a few days in two urban centres, and 8-10 days in the Pilani Hills living in one of the children's homes, interacting with children in informal and formal settings including doing some teaching in the on-site school. The emphasis is on learning about

India (environment, culture, religion) and education. At the end of the three weeks the group returns to Kerala, bringing participants 'full circle'.

- In both 'courses', UK participants are encouraged to keep learning journals during the study visits which, together with regular reflective sessions, enable them to critically reflect on, and learn from, their experiences.
- Different people involved: the Tide~ study visit course is for qualified teachers and educators of varying levels of experience, from newly qualified teacher to headteacher and university lecturer. The group is between 8-12 people, including leaders. It is co-led by a Tide~ member of staff and an assistant headteacher. The Gambian hosts are members of staff at the NEA who co-ordinate an Education for Sustainability (EfS) teacher sub-committee. Gambian teachers who work with UK teachers during the study visit are members of this committee.
- The CCCU study visit is for a mixture of students on a three year education programme, many of whom will go on to become teachers, and students on a one year PGCE programme. It is co-led by between two to three CCCU staff, and the group often consists of one or two other members of staff who are accompanying the group for the first time as part of their professional development and who may go on to co-lead in the future. The group is usually between 14-18 including staff. The Indian hosts are members of the GCH management committee in Tamil Nadu, and staff at two GCH centres in the Pilani Hills. Staff of GCH includes teachers, house-mothers, and development workers.

Findings

As members of the UK part of the research team, we cannot avoid our positioning as people working within the Western academy, who also had roles as a former leader of the Tide~ study visit (Fran Martin), and a previous

participant in the Tide~ study visit (Lynne Wyness). We acknowledge this not to absolve us of any responsibility to bias, but to raise awareness of potential biases that we have tried to remain conscious of during our analyses and interpretations of the data. In this regard, while data gathered from the Southern organisations have been analysed by the local research consultants, we have made our own selections from those analyses and thus introduced a further potential for perspective bias. However, since all stages of any research project involve a process of selection, we do not see this as being necessarily problematic as long as our purposes for selection are clear. The purposes of the whole project have been discussed above. For this article, as the title suggests, we have selected from the data analysis those findings that inform the nature and development of two global ‘partnerships’ or ‘links’ and then discuss, with reference to data from the study visits, these relationships as sites for mutual learning. We finish by providing a postcolonial framing of the findings and considering some of the implications for global, intercultural learning through partnerships.

Tide - NEA partnership

The partnership between Tide~ global learning and the NEA began in 1999, although there had been some links between the two organisations for some years before that. First and foremost there was recognition by all those interviewed that developing a partnership based on ethical ways of working was a long-term venture. As the current Tide~ director suggested in May 2010, ‘The length of time that it really takes to develop a partnership that is open, mutual and reciprocal, that does develop organically, is hugely a long-term venture.’

The more formal arrangement grew out of a shared desire to increase the capacity of each organisation to support teachers in the teaching of sustainable development. This reflected each organisation’s own remit: Tide~ of being a teacher network for professional development about global and sustainable development issues; the NEA of working with teachers through an EfS sub-committee on embedding sustainable development education within the primary school system. From the outset, the two organisations discussed a shared goal of working together in ways that were underpinned by principles of mutuality, reciprocity and equality. In this, there was an explicit focus on what ethical engagement meant in the context of a North-South partnership, and

there was a commitment to work in ways that challenged the neoliberal, donor-recipient patterns of relating that are common to many North-South educational partnerships (Martin, 2008; Edge et. al., 2009). For example, the question of funding came up at an early stage and it was agreed that neither organisation wanted to enter into a financial arrangement, but that each would find its own resources to support and enable joint activities to take place:

“We are not making money demands nor are we offering you money”
(former Tide~ director, November 2009).

“Basically the whole purpose was to talk about environment and development issues in terms of environment education and this has led to a lot of useful things for both the Gambian side and the UK side and what happened is this is a partnership we are, we do what we call mutual learning ... So it’s not like conditional, it is anything that is done is done on mutual basis” (NEA section director, January 2010).

The unconditional nature of the relationship mirrors what Andreotti has referred to as ‘a pedagogy of love’ (2012), and was expressed by both partners as central to their understanding of mutuality. The commitment to working together in ways that were not conditional was a principle that required continuing communication, coming together over joint projects and building up trust. Building trust was identified as important in the sense that other organisations had come from Europe before promising sums of money to facilitate certain types of activity, but often these had not materialised. Tide~ stated explicitly that ‘*we don’t want to exploit you but we want to learn something*’ and that they were seeking to work together ‘*but in a quite modest sort of way*’ (former Tide~ director, November 2009), so expectations and goals were initially not too ambitious which allowed the partnership to develop at a pace that felt comfortable to both organisations. The informality of the partnership is seen as an enabling factor in helping to avoid the power differentials that often follow when funding from one partner to another is involved:

“Partly what makes it work is that it doesn’t actually get into a dependency and that was my...”

Fran Martin: “So a dependency in the sense of?”

“Well you know that we are not seen as a formal relationship that requires accountability about funding” (former Tide~ director, November 2009).

This does not mean that differences in financial resources are not recognised or acknowledged within the partnership, but it also does not mean that imbalances in resources lead to inequality in the relationship. There is sometimes an assumption that equality means that things have to happen in the same way on both sides. The Tide~NEA partnership challenges this idea by adhering to a concept of equality that is built on non-hierarchical, democratic processes and where the expectations for involvement come from within each organisation rather than being imposed by either one on the other, and that these expectations are then openly discussed and joint decisions about what is feasible are taken. For example, early in the partnership work was done on a joint publication (Tide~/NEA, 2002) that was the result of creative work done by UK and Gambian teachers working together during study visits in 2000 and 2001, with a launch of the publication in The Gambia in 2002. Resources in terms of time, expertise and access to fieldwork sites in The Gambia and the UK were shared equally, financial resources for producing and printing the publication were provided by Tide~, while the NEA provided the resources (venue, meals, transport) for the launch event. The publication was then distributed free of charge to a range of schools in The Gambia, while it was available for sale through Tide~’s online shop in the UK.

Similarly, each organisation puts its own resources into the biannual study visit of UK teachers to The Gambia. From the UK side, the teachers pay for their study visit course, and Tide~ supports the cost of the course by providing the leaders; from the Gambian side, the NEA organises the programme of fieldwork during the study visit, and both the NEA and Tide~ share the costs of a day conference. Two days of joint fieldwork followed by a one day conference provides the ‘inter’ cultural space in which Gambian and UK teachers, together with staff from the NEA and Tide~, work collaboratively on their understanding about sustainability issues and the pedagogical approaches best suited to teaching about them in their respective educational

settings. Preparatory work by Tide~ course leaders, and by NEA leaders of the teacher ESD sub-committee explicitly focuses on mutual learning and this is modelled for teachers during the study visit itself. In some respects, this supports the creation of a ‘Third space’ during the intercultural conversations, with each in the conversation being teacher and learner, and thus enhancing the possibility of new understandings arising for both.

However, it was mentioned by many of those interviewed that working within the principles established was an ongoing challenge and one that they kept having to come back to and remind each other of: *‘If you are serious about mutual [processes] then both sides have to prepare for it’* (study visit course leader, May 2010). This came after the study visit in February 2010 when there were questions raised over whether the UK took too much of a lead during the day conference: the NEA waiting for Tide~ to take a lead, Tide~ wanting to make the most of the time for the UK group’s professional development and so each unwittingly repeating a colonial pattern of behaviour. This then became the subject of discussion between Tide~, the NEA and the research team who were able to offer further insights due to their participant-researcher roles. The next section explores in depth the challenges, benefits and outcomes arising from the partnership between Canterbury Christ Church University in the UK and Goodwill Children’s Homes in Tamil Nadu, India.

Canterbury Christ Church University - Goodwill Children’s Homes link

The members of each organisation who play a lead role in the relationship describe it not as a partnership, but as a strong link that was first established in 1997. Rather than being a formal arrangement between organisations, it has developed on a personal and individual level as members of CCCU were seeking to provide student teachers with an experience in a ‘developing’ country that was not in a tourist area but that was in a safe setting. The Dean of the Education Department at the time was a member of the trustees of Goodwill Children’s Home, a UK based charity with an Indian committee that manages day-to-day matters in Tamil Nadu. The children’s homes in Tamil Nadu were suggested as a suitable experience, and so began what has become a long-term connection between a number of CCCU staff and staff and trustees of GCH in Tamil Nadu:

“Yes. I mean, I felt very much that we were... what we wanted to do was to give students overseas developing world fieldwork experience and that’s really where it comes from. In that sense we weren’t looking at a partnership.... [W]e’re providing students in the UK with the chance to see and experience educationally, something which they couldn’t see and experience educationally any other way” (CCCU study visit leader, June 2010).

“Canterbury Department of Education College had an idea to make a visit to the developing country to understand the reality.... [A] developing country like India could be useful to the students to know the multi-cultural situation and also the emerging, developing countries point of view to the students of Canterbury for experience learning” (GCH member of staff, July 2011).

However, although the initial motivation was one of finding a safe location for yearly study visits for UK students, it became quickly evident that education as a focus would be mutually beneficial to both organisations:

“Mainly the relationship was educational relationship between the students. When the students from the Canterbury group came here they joined with our children and they were really happy. Naturally the relationship helps their education also. Whenever they come here, they went to the school and they talked to the children about their UK experience, because the children don’t know the western culture” (GCH former headteacher, July 2011).

It was from this base that friendships developed and that took the relationship beyond that of running and hosting a yearly study visit. When interviewed, staff in CCCU and GCH most often describe the link as ‘deeply human’ and ‘like a family’. As an outsider, it is possible to interpret this as being reflective of the paternalistic, donor-recipient relationship that exists between the two organisations. However, in their interviews staff expressed the value they found in the deeply personal nature of the relationships they have developed:

“The relationships which support the visit... are very strong, very important” (CCCU study visit leader, July 2010).

“Education is the main focus. The main focus leads us to very good friends. Two hands make a noise. Two hands make it nice” (GCH project leader, July 2011).

The study visits provide professional development for GCH staff through learning about UK culture at first hand, and communicating largely in English (Tamil is the first language for the majority of GCH staff) and thus enhancing language skills. Goodwill children improve their English, but GCH staff also see that the yearly visits become something that the children look forward to, and that the interactions raise their aspirations to go on to higher level study and enter into valued professions:

“They shared their feelings and taught English language to the Goodwill Home children. English was difficult for our children to understand earlier. Really it is a chance to learn the culture of Canterbury and also they learn something while they are sharing” (GCH office staff, January 2011).

“The multi-cultural understanding and how they understand, that kind of thing was real learning. How a thing can be perceived differently by different people, having different cultural background” (GCH member of staff, July 2011).

“I want to see some children must be a doctor. Some children must be an engineer. They must learn and achieve the top level in their life” (GCH project leader, July 2011).

The fact that GCH is a charity and is financially reliant on donations from the UK (organised through the UK board of trustees and a GCH field officer) brings a number of challenges. It is understood that the relationship cannot be symmetrical, but this does not prevent it from being mutually beneficial:

“We respect our hosts, they respect us, and I think we bring to them and enrich their lives in different ways, just as they enrich our lives in different ways. And so it’s predicated on a relationship of some sort of trade-off, some sort of balance. It’s not symmetrical, but there is a balance and it’s a bridge” (UK study visit leader, June 2010).

Part of this trade-off is a straightforward exchange of payment for accommodation and subsistence for the visitors. An additional donation is also given as recompense for enabling the students to do some teaching in the primary school on three or four occasions during their stay. As GCH is a charitable organisation dependent on donations from the UK, discussion about funding and requests for additional support are integral to the relationship between CCCU study visit leaders and GCH staff. There is recognition that ‘paternalistic ways of relating’ are problematic, not least because of what they model in terms of the learning of CCCU students:

“I’m not very comfortable with child sponsorship...quite a lot of our students have...continued the relationship with Goodwill on that level and that undoubtedly brings huge benefits to children in the homes” (CCCU study visit leader, June 2010).

So whilst there is a desire to develop ways of relating that are alternative to dominant donor-recipient models, the reality is that in this particular context this is a big challenge and that, rather than stop the relationship, the ethical thing to do is to explore, through intercultural conversations and critical reflection, how to continue to work together in ways that enhance the learning of all involved. For CCCU students it was evident in our interviews with those who had taken part in visits between 2004-2009 that they continued to struggle with the desire to avoid reinforcing stereotypes in their teaching but, where they were involved in a school partnership, not knowing what other alternatives to fund-raising existed.

“... if you want to see real change without generations and generations going by where things aren’t happening, what’s the alternative? [...] There is no alternative is there, there’ll always be a place for charity,

because [India's] never going to catch up quick enough" (Teacher who took part in CCCU study visit in 2006, interviewed 2012).

This highlights how, if viable alternatives to a dominant practice are not discussed as part of study visit courses, then it is difficult for teachers to move away from the existing discourse embedded in schools that we have argued above is based on neoliberalism.

Mutual learning

Many of those interviewed from the four organisations talked about their understanding of 'mutual learning'. The term 'mutual' was part of the vocabulary used during the pilot studies (Martin, 2007, 2008), with the term 'mutual learning' being explicitly explored with participants during the Tide~study visit course (Martin, 2008). It was also evident that both partnerships were, within their specific contexts, working out what mutuality meant to them in practice on a day-to-day basis during the study visits themselves, and at a more strategic level between visits. In the activity that can be called North-South educational partnerships there is much guidance on how to develop a partnership that is based on principles of mutuality, reciprocity and equality (UKOWLA, 2012). These are contested terms and we aim, through our findings, to share the ways in which the concept was not only understood within the partnerships, but also how working together over a period of time led to a deeper understanding of what it meant in practice. It is our view that it is the process of coming to deeper understandings of principles through learning inter-culturally that is central to the development of ethical relationships:

Tide~NEA perspectives on mutual learning

Mutuality was a term used frequently by Tide~ staff who were interviewed, not surprising since they had been developing a discussion paper on mutual learning as part of their ongoing work leading study visits.

"Mutual learning has been at the heart of the partnership with our Gambian colleagues...and the way we have worked together as groups of teachers, both in The Gambia and within our own groups" (www.tidec.org, 2012).

Mutual learning was expressed as one aspect of developing a mutual relationship between Tide~ and the NEA, other aspects being mutual goals, mutuality over organisational focus on a common issue, and mutual benefits gained from the partnership. It was clear that for the partnership to work, adherence to the principle of mutuality had to be evident in all aspects of practice, and that this was connected to working in an equal way:

“We work in an equal and open way...we match what we give with what we receive” (Tide~ course leader, 2010).

and that this was reflected in the study visit course:

“People come on the course knowing that working as a group is part of it ... you should be interested in the idea of mutual learning and this is explicit in the criteria at both application and interview level” (Tide~ course leader, 2010).

Mutual learning is given a high profile in the study visit course because, as modelled through the partnership, it is an alternative way of working and relating between the global North and South to the more stereotypical ways so often portrayed in the media and through campaigns such as Make Poverty History. It is also important that UK teachers who go to The Gambia for a week and work with teachers in the NEA subcommittee do not behave in ways that would disrupt what has taken some years to develop. In this respect, the preparatory phase of the Tide~ study visit course is essential for developing the group’s understanding of mutual, intercultural learning and the processes involved.

The former director of Tide~ was also clear that mutuality meant striving for equality, but that while there were obvious discrepancies in each organisation’s access to financial resources, this did not prevent the relationship from being mutually beneficial. Thus, when there were reciprocal visits from The Gambia to the UK, these tended to be key personnel from the NEA rather than teachers, although some teachers did come to the UK in the early days. However, ‘this has not weakened the partnership or the sense that there are still

mutual concerns to be explored together' (Tide~ director, January 2010). And this is confirmed by the NEA's sector director:

“This North-South partnership is very unique. It is not a matter of one part giving and the other receiving. It's a give-give, receive-receive mutual exchange between organisations, individuals and agencies, and in a sense is a model for sustainable development and bridging North-South.... All partners contribute equally as nations, organisations, individuals. We have learnt a lot at an educational level, an environmental level, even a cultural diversity level. It is very important and we would nurture it at any cost” (NEA Section director's welcome at conference in The Gambia, February 2010).

It was striking how the way in which mutuality and mutual learning was conceived by individuals across the partnership was remarkably similar although, as noted earlier, it remained a challenge to apply these principles to their relationships in practice.

CCCU-GCH perspectives on mutual learning

The term mutual was not used directly by many of those interviewed in CCCU and GCH, but people interviewed across the partnership talked about things that could be interpreted as concerning mutual learning. The way in which it was discussed related to mutual respect, commitment to long-term relationships, mutual exchange of ideas, and the aim to be equal in what each gained from the relationship:

“We respect our hosts, they respect us...we enrich their lives in different ways just as they enrich our lives in different ways...so it's predicated on some sort of balance. It's not symmetrical, but there is a balance and it's a bridge [across cultures]” (CCCU study visit leader 1, June 2010).

“When foreigners come here, we all feel good that our work is being recognised by other foreign friends. It is, if once they are familiar then it is easier to explain our activities and whatever they raise questions by

that expand our ideas and action through understanding with each other” (GCH project leader, January 2011).

“Visitors interact with the children in a way that is beneficial for everybody” (GCH former field officer, July 2011).

A concern – ‘are the scales balanced...people here, what have they gained.... I don’t know whether it’s a fair and equal exchange?’ (CCCU study visit leader 2, June 2010) – was articulated by Canterbury staff but not by Goodwill staff who were clear that ‘it’s an educational relationship, it’s a family relationship’ and that in this respect one would not expect things to be exactly equal all the time.

The history behind the link was evident in how the relationship had developed over time, and this was of concern to several people. GCH was set up in the 1970s by a Scottish man and at the time the model on which the children’s homes were based was that of a Western boarding school, with ‘a very paternalistic feel about it’ (GCH chair of trustees, UK). The study visit leader who had been involved as leader since 2000 acknowledged that there continued to be ‘problems of paternalistic ways of relating’, and that these were hard to move away from when the relationship between CCCU and GCH was blurred with the relationship between GCH UK and GCH Tamil Nadu. This was partly because, at the beginning, staff at CCCU also had roles as trustees in GCH UK, and CCCU study visit leaders sometimes expressed the feeling of being a mediator between GCH UK and GCH Tamil Nadu.

However, many interviewed stressed that while there was an undoubted charitable relationship, the thing that they valued most was the benefit gained for all through coming to better understand each other’s cultures and through the development of deeply felt, long-term friendships:

“The attachment lasts through time and space, and there is mutual benefit to...the children and to the students.... We each give a gift of affection as well as a gift of learning” (CCCU staff study visit participant, July 2010).

“Many come and go and do not maintain the relationship. Canterbury is different, you stay with us [8-10 days] and return each year” (GCH staff, July 2010).

The length of time of the visit means that there is the chance for relationships to go beyond surface level, students, staff and children interact every day, sometimes eat together, play together and students spend time learning how to teach in an EAL context. They have to work hard at trying to understand each other – Indian English is not the same as British English and it becomes clear that language is about more than the words spoken, it is also about the cultural understandings that underpin it. In this way the commitment enables a relationship that is not based on educational tourism, and in turn this enables more mutual ways of relating to develop over time.

Discussion and conclusion

In summarising and discussing the findings, our intention is to note patterns across the two cases and to relate the similarities and differences between them to their specific contexts. The research aimed to address gaps in knowledge about whether study visits framed in a long-term global partnership enable deeper and long-lasting changes in worldviews about the ‘Other’ (Said, 1985), and gaps in Southern perspectives on this phenomenon.

It is evident that both partnerships have endured due to the common nature of their key goals (sustainability education for Tide~/NEA, cultural and school education for CCCU/GHC), the commitment of both sets of organisations to continue to work together towards those goals, and to do so in as ethical a way as possible. With regards to the latter, the principles underpinning the relationships are those based on mutuality and equity, with both sets of organisations demonstrating an understanding of equity that is situated – in other words, that things do not have to be done in the same way on both sides of the partnership. In this way common goals are interpreted as appropriate at a local level, and the practices and activities that enable their achievement relate to local environmental, social, political and economic factors.

In both cases there is also evidence to suggest that the long-standing educational relationships between visiting and host organisations enable deeper

mutual, intercultural learning to take place. Nevertheless, there is a significant difference in how each partnership started, and the type of relationship that underpinned the original agreement. In each case this has affected the nature of the relationships that have subsequently developed at two levels: the long-term relationships between those in a lead role in the partnership; and the short-term relationship between those who take part in a study visit.

Tide~/NEA knowingly, from the outset, wanted to develop a working relationship based on mutuality, reciprocity and equity. This was an explicit part of the early conversations and agreements, and is evident in the common understanding of mutual learning across the interviews. In order to achieve consistency between the long-term (partnership) relationships and the short-term (study visit) relationships, the preparatory phase of the Tide~/NEA course is crucial in framing the study visit as an activity in mutual learning, and in going through the process of 'learning to unlearn' (Spivak, 1990). In terms of the necessary conditions for 'Third space', this process is part of becoming aware of the cultural and historical influences that affect how the teachers in the partnership 'read' each other, which enables them to suspend, or step outside, these cultural references into a space between cultures. This provides a sound basis from which, during the visit itself, participants are able to 'learn to listen' to, and 'learn to learn' from, the multiple perspectives found in the numerous intercultural interactions afforded by the visit, and to do so without unwittingly using one's own norm as a basis for judgement. To successfully enter into the inter-cultural, or Third, space it is incumbent on both parties to do the work of unlearning, listening and learning, and these processes are also evident in the NEA's work with the Gambian teachers through their education for sustainability sub-committee. Nevertheless, the principle of mutual, intercultural learning is not always easy to achieve in practice and there are times, as the data showed, when elements of neo-colonialism are evident in the relationships in the partnership, indicating that this is a challenge that requires ongoing attention through dialogue.

CCCU/GHC, on the other hand, began what they describe as a strong link because when a lecturer was looking for a Southern location to take student groups, the Dean at the time happened to be involved with the UK charity Goodwill Children's Homes. A donor-recipient relationship thus

already existed between India and UK GCH, and is evident in how individuals relate to each other throughout the partnership. Counteracting the strength of this legacy is something that both the study visit leaders and the hosts aim to achieve each year, yet there are other contextual factors that make this quite a challenge. The UK group's preparatory phase takes place in Kerala, a tourist area and, as Abbot argues, narratives that have their roots in colonialism are reproduced because, for local people, members of educational study visit groups are 'indistinguishable from any other set of "white" tourists' (2006: 335).

Kerala thus provides the first opportunity to experience at first-hand what a donor-recipient relationship feels like, and for many this is extremely uncomfortable, but at the same time it reinforces a view of India as a place of poverty and need which can act as a barrier to the process of 'learning to unlearn'. The subsequent experience of relating in the 'family' ethos of Goodwill Children's Home provides a further disturbance to students' thinking because the children do not look like, or act as if, they are poverty stricken. Early in the visit this provides the focus for much discussion within the group, facilitated by group leaders. It is then the length of stay, 8-10 days, that affords the time to have extended conversations with staff and children that enables deeper learning to take place, as misunderstandings and different cultural 'translations' of situation become evident and points of further discussion.

It is these differences that have been particularly productive in what we have learnt from the research. The reality is that not all partnerships begin in the same way. While there is a wealth of advice available through, for example, the British Council and UKOWLA (2012), on how to begin a global educational partnership based on ethical principles, many start out of circumstance rather than formal planning and it is only later that advice on how to work through tricky issues is sought. The two cases here provide examples of how each partnership has collaborated to embed mutual, reciprocal and equitable ways of relating and working.

In the Tide~NEA partnership they are doing this within the macro-scale context of a dominant discourse about Africa that continues to 'colonise the mind' of those on both sides of the partnership. In the CCCU-GCH relationship they are doing this within the micro-scale context of the historical

charitable relationship between the two organisations. In this respect, how people in the two partnerships articulated their understanding of mutual learning also reflected the nature of their relationship and the ‘habits of mind’ (Mezirow, 1985) they were trying to disrupt. A crucial element in the ‘decolonisation of the mind’ (Merryfield, 2000), is the time to reflect on and deconstruct these discourses about the world. It is only by recognising our own worldviews and the foundations underlying these, that we can begin to ‘learn to unlearn’ (Spivak, 1990). We argue that it is through a supported study visit course that this unlearning is more likely to take place.

To conclude, at the heart of a global partnership and a study visit is the intercultural encounter, and this is a site of relation between the visitors and hosts, providing spaces in which difference is encountered and negotiated. We argue that each needs to be framed as a relational venture – where there is an explicit focus on relational forms of knowledge about culture and identity, self and other. Too often the way in which educational partnerships and study visits are framed is that they provide opportunities for UK participants to learn ‘about’ others, their cultures and lifestyles. If opportunities for the host community are considered (which is not guaranteed) it is often in the form of what the visitors can ‘do’ for ‘them’. What this unwittingly does is to position the ‘Other’ as an object of study, and thus recreates aspects of the colonial mission. We argue that this does little to support the development of ethical relationships that are necessary if we are serious about achieving deeper intercultural understanding.

Note on terminology: We recognise that the terms North and South are not unproblematic and have a variety of meanings depending on the context in which they are used. We use them in this article to represent a spatial distinction between countries that are globally located in the northern and southern hemispheres. When we discuss hegemonic discourses that affect relationships between these two, we use the terms Western and Southern.

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MICRO-DEVELOPMENT INITIATIVES AND THE POTENTIAL ROLE FOR HIGHER EDUCATION INSTITUTIONS

Gerard McCann

Introduction

Since the 1990s, international economic development policy has increasingly been rebalanced towards transnational corporate and macro-economic actions with priorities being based largely on gross domestic product (GDP) growth patterns and structural adjustment programmes. The emphasis has been placed on commercial growth without adequate attention being given to the potential of the sociological side of development. The link between the empowerment of local communities and economic regeneration is often lost in neo-functionalist mechanisms for integrating peripheral economies within the global market system. Indeed, various aspects of the global development system have brought development policy and aid support in general into question with exogenous factors impacting heavily on the development of poor countries (Glennie, 2008; Moyo, 2010; Karlan and Appel, 2011).

From the perception of the recipients of these policies, functional interpretations and activities need to do much more to encompass society in general and, as Amartya Sen contended in *Development as Freedom*, to facilitate a process of emancipation. For many it needs to be as straightforward as constructing policies that will contribute to poverty alleviation. Abhijit Banerjee and Ester Duflo, the authors of *Poor Economics*, presented the problem succinctly: ‘if we could give up the lofty goals and empty promises and focus all our energies on the concrete steps we are able to take here and now to improve the lives of the poor worldwide, we would bring some real comfort to the lives of millions’ (Banerjee and Duflo, 2012: 13).

Ultimately any pro-poor definition of development is about empowering people to gain control over their own destinies, while enabling them to shape their own cultural, social and economic environments. From this perspective, development – a process of economic adaptation – should be primarily life enhancing as well as being structurally supportive and sustainable.

A corollary of this principle is that the voices influencing policy design should come from those most affected by it. Taking a broad survey of policy and practice, this article will look at alternative economic models of poverty alleviation, focusing on community sourced initiatives. It will also highlight the potential role of community-linked institutions, such as universities, in providing a hub for micro-economic development in marginalised and peripheral areas.

Redefining the Micro

Activities that promote empowerment in local economies can have a significant impact on the life chances of individuals and families in highly vulnerable regions. Increasing evidence from across the developing world would suggest that the nurturing of micro-initiatives in particular can stimulate growth patterns that assist self-reliance and community development for the most vulnerable (Madeley, 2000: 73-90; Collier, 2007: 79-96; Armendáriz and Morduch, 2012: 57-85). The potential for individuals and communities to control economic activity at a localised point can invariably only come about at a micro-level, giving social enterprise a peculiar place in the roll out of economic agency. In effect micro-development – locally supported economic activity within a partnership framework – remains one of the few proven mechanisms bringing tangible economic benefits to the most marginal of communities.

Conversely, macro-development by and large facilitates state and corporate actors in the development process. Indeed, the inability of many regions to escape spatial poverty cycles would suggest that the main beneficiaries of many structural adjustment initiatives are not the target communities, but the actual purveyors of investment. That is, large scale aid and development operations often miss the most vulnerable in a race to support the governmental and corporate elements in an economy, seeking short term political objectives, without recognition of the importance of community development in enhancing the potential of those working in locally managed (often informal) economies. It is arguably in this environment where micro-development initiatives can have a direct and immediate impact. Yujiro Hayami and Yoshihisa Godo, in *Development Economics*, put it another way:

“Hierarchical organizations, including not only firms but also government agencies and non-governmental organizations, are likely to fall into functional disorder with a high incidence of moral hazards, unless the community mechanism of cooperation is incorporated in some form or another” (Hayami and Godo, 2005: 316).

These ‘community mechanisms’ are one answer to the inequities that often arise from the macro-development process and include, for example, cooperative forms such as social economy initiatives, educational institutions and church networks already positioned to take local interests forward. The hub for growth already exists, but needs the catalysts of smarter investment and deeper disbursement.

The principle of subsidiarity has been the mainstay of European development since the inception of the European Community, locating policy and decision making as close as possible to the people who are being affected by those decisions. Applying this simple principle in its broadest sense to global development practice would bring the responsibility and agency for economic regeneration to those sections of the community who are most affected, positively or adversely, by investment. It suggests that if external investment is to sufficiently influence change and growth, then those subjected to the intervention should have a leadership role in its design and management. This could mean a targeted series of initiatives that would progressively and sensitively encourage the community sector’s economic strategies.

Governments often step in to organise at a micro-level when the community actors are in all likelihood in a better position to locate contextually appropriate opportunities. As experience has shown in industries such as the copper mines of Zambia or the cotton fields of India, where unregulated corporate interests are involved it is often to the detriment of the most susceptible to economic adjustment. Entrusting development to local agency with reference to community development arguably brings forward a different dynamic in terms of actual impact and the democratic decentralisation of investment. Jain, Krishnamurty and Tripathi noted this very succinctly in *Grass Without Roots*: ‘the basic reason for the failure of rural development and

poverty alleviation programmes is the exclusion of the people from participation in the development process.’ (1985: 15).

Article 5 of the Treaty on European Union presents what is considered a prerequisite for policy design for most developed countries and certainly for all of the former colonial powers:

“Under the principle of subsidiarity... the Union shall act only if and in so far as the objectives of the proposed action cannot be sufficiently achieved by the Member States, either at central level or at regional and local level, but can rather, by reason of the scale or effects of the proposed action, be better achieved at Union [macro] level”.

In other words, actions should be consensual and start with the beneficiaries before working upwards towards intra-state and transnational actors. Giving the local voice primacy is accepted here as the most effective means of developing peripheral economies.

This type of inclusivity anticipates what Denis O’Hearn labelled the ‘sociological’ approach to economic development, where a socially focused partnership works to integrate external and indigenous elements to benefit the recipient communities. For O’Hearn, the potential of community development has been historically frustrated by ideologically driven structural strategies that have prioritised donors at the expense of target communities. In particular he remained resolutely critical of orthodox, market-fixated methods of investment, viewing them as having longitudinal detrimental effects on the most impoverished communities:

“In countries where aggressive free-trade policies were imposed, the result was often a diminution in the well-being of large segments of the population, who lost even the most meagre safety nets in housing or health policies, while paying greater proportions of their incomes for basic necessities such as water and energy” (2009: 101).

The geography of development and the extent of divergence between regions provide ample evidence to verify O’Hearn’s claims. In practice an economic development model that may work in the suburbs of Oxford or

Chicago, cannot possibly be equally applicable as development architecture for the townships of South Africa, Kibera compound, the slums of Kolkata, or the Gaza Strip. One Western designed free-trade model cannot fit all contexts, where geo-economic factors differ absolutely. The contextual compliances in a myriad of development scenarios plainly do not exist for that peculiarly Western ideological prescription more recently described as neoliberal.

Component Aspects

From the evidence, micro-development would appear to provide a mechanism that can tailor investment and partnership in an empowering, regionally based and socially sensitive manner (ILO, 2012a). With ideological baggage stripped from the process and the exigencies of subsidiarity applied in an inclusive sense, there emerges the possibility of accountable development strategies. Pioneered by the International Labour Organisation (ILO) as an extension of successful micro-credit projects, micro-development strategies aim to contribute to the generation of pro-poor economic growth and quality employment through integrated programmes for the development of micro and small (often NGO-led) enterprises that focus on social as well as business development. Projects are mostly partnership based and are often transnational, institution to institution, or NGO to NGO. Included in this development methodology are initiatives aimed at the reduction in poverty and unemployment which also directly contribute to economic sustainability.

Given that in most developing regions micro and small enterprises (MSEs) account for most economic activity, their role in regeneration needs to be acknowledged and supported within the indigenous context. In recent years the ILO has highlighted this sector for investment and demonstrated an understanding of the spatial complexities of community development for those wanting to participate in business in a developing region. However, while acknowledging their importance to societies prone to poverty cycles, MSEs face what the ILO terms ‘significant structural, fiscal and non-fiscal issues and challenges’. These challenges include restricted access to credit, transport constraints; a technological deficit with importing competitors; limited market access; restrictions on management, enterprise and book-keeping training; a lack of statutory transparency when it comes to quality assurance and legal restrictions; a need for networking opportunities; and limited opportunities for

outsourcing. In micro-development these obstacles can be seen to be the anticipated challenges for the foreseeable future (ILO, 2012a, and 2012b).

Micro-development initiatives are common enough, but analysis and evaluation are badly needed to enhance evidence of the potential of this model. Initiatives vary in scope from country to country, but have generic objectives that can best be viewed as organic economic development partnerships. Some MSEs offer their own definitions of what they believe micro-development has to offer. The NGO Micro-development Partners defines it as:

“Building partnerships with those in the developing communities so that the real needs of the local people can be discerned, and so that they participate in determining their development priorities; in our own community in order to foster increased understanding of our mutual development needs in both developed and developing countries; amongst global organisations involved in development initiatives” (MP, 2013).

With a more specific social enterprise remit, the Nepalese United Nations supported micro-development agency Medep states that its objective is:

“to help low-income families become entrepreneurs, promote the development of their enterprises, and then create a strong partnership between consumers of micro-enterprise products and services and local service delivery institutions. This is expected to boost micro-entrepreneurs to create a new and dynamic business sector... The development aim of the programme is to contribute to the government’s efforts to reduce poverty in the country. Its goals are two fold: one to reduce poverty among low-income families in rural areas, and the other is to ensure the institutional development and capacity building of local service delivery organisations to work as catalysts in the development of rural micro-enterprise sectors” (Medep, 2010: 4-7; Medep, 2013).

In India the government enacted the Micro, Small and Medium Enterprises Development (MSMED) Act (2006) which encompasses activities across the

enterprise spectrum, including social economy initiatives. The Act – although limited to manufacturing and services with restricted incomes – has generated recognition of the scope of community economic activity. Four key facets emerge from the various interpretations of micro-development. The first is mutuality, *partnership* which could be local or global; the second is the need for *capacity* building for initiatives and productivity; third, not to exclude any sectors of the community from participating, *inclusion*; and finally, there is the urgency of putting in place effective strategies for *poverty alleviation*.

Collectively these actions represent a base line for micro-development in its most integrated sense. Rasigan Maharajh, Alioune Sall and Geci Karuri-Sebina from Tshwane University, Pretoria and the African Futures Institute, put it bluntly:

“it is critical to ensure that development paths are inclusive, both for efficiency as well as humanitarian and security reasons. Systems of innovation have to be relevant and accessible to the broad base of the population, not only by addressing issues of basic need (health, energy, food, water), but also in appealing to the globalised aspirations of youth and communities” (2012: 155).

The social obligations of micro-development introduce a clause into economic development that can help to address localised welfare provision deficits.

Precedents to Date

The most familiar examples of micro-development across the developing world have been the micro-credit movement, gender based investment initiatives, cooperatives, educational and training partnerships, the agricultural pooling of resources, small business start-ups and a variety of IT projects. Collectively these represent the weight of micro-development enterprises. The potential is evident in each of these manifestations as well as others not mentioned and are recognisable as micro-development. Conversely, state and international investment in these sectors has been largely disparate, sporadic, uncoordinated, and the lack of it has been a further obstacle to sustainable growth.

Central to the management of micro-development initiatives has been the understanding that the people involved and their trust underwrite effectiveness and productivity. The process is derived from business theory that is prominent in many social democratic economic models: that the quality of the working environment and an adequate standard of living for employees are implicit to productivity and growth. As is expected in the majority of more economically developed countries (MEDCs), safe working environments and workers' positive experiences can enhance productivity in whatever sector involved. Motivation, morale, collaboration, a work-life balance, rights and strategic influence – all of which are considered good practice in the workplace in developed countries – are implicit to any productive working environment. What is expected by populations in MEDCs should be a realistic aspiration for workers in least developed countries (LDCs) also, and should be invested in accordingly.

Micro-development initiatives offer a unique opportunity with regard to company operations in that with small, indigenous bases, the involvement of the staff in the creation of conducive working environments is easier to achieve than top-down corporate structuring imposed from foreign headquarters. At its core it means investment in the staff (Thirlwall, 2011: 236-237). The ILO suggests a three-pronged approach to creating a conducive enterprise environment in developing regions, based on: first, awareness raising, collecting and disseminating best practice, knowledge of case studies and demonstration workplaces. Second, an implementation system that would substantiate gains and provide a platform for technical advancement. This aspect is intended to work toward the clustering of enterprises for strategic development. Finally, research, analysis and networking; generating good practice to build on improved working conditions while consolidating productivity (ILO, 2012c).

Spatial Inequalities

One aspect of economic development that has come sharply into focus since the onset of the current global depression has been the differentiation of opportunities between communities and regions – the spatial gap that accentuates global inequalities. The stress that has been placed on indigenous and community based economies has to an extent isolated many in informal sectors, those on the periphery of more manageable, or taxable, transactions.

Literally millions of people reside in this economic space outside the formal economy. They are consequently not encountered by formal structures due to the nature of their activities and the limited revenue involved. Acknowledging local economic development (LED) micro-development initiatives as integral to the regeneration of an economic base and nurturing this third sector as a means of stimulating economic activity contributes to the growth cycle.

One key reason for acting through this non-governmental, non-corporate, third level is that it can utilise local resources and knowledge to encourage employment creating activities. It can become a catalyst for organic business and a framework for market enhancement that is appropriate to the context. Ultimately, such strategies are about building local capacity for sustainable economic development. In this, it should necessarily incorporate planning and targeted investment, which is something that external agents could assist with, be it through university links, NGO partnerships or a community-to-community (MEDCs-LDCs) transfer of skills.

In recent years the ILO, along with other funders, have taken positive actions to support local projects through orchestrating policy adaptation for planning and maximising the potential of any investment. This has helped to bring various stakeholders together to work out appropriate relevant schemes for business incubation via MSEs. It has also meant that a conversation on micro-initiatives has been taking place at a local level. Working ‘from below’, a more consensual approach to strategic investment and subsidiarity can occur. Furthermore, scrutiny of local enterprise, coupled with experience of good practice, can provide a catalyst for strategising within the local environment. This involves searching out economic activity and labour options to assist with capacity building, including training and skills enhancement for those willing to advance down this route. The demand and supply of goods and services could also be consolidated within different contexts. As the ILO notes, support for this should include: ‘The strengthening of an enabling environment for micro, small and medium enterprises at the local level...formalization among entrepreneurs, entrepreneurship training and leadership, value chain upgrading, business development services and access to finance’ (ILO, 2012a). Beyond this initial integration into the formal economy there needs to be the adaptation of social security provision for those involved and risk assessment to ensure that

the individuals and families who have come forward to participate in micro-schemes are not adversely affected by their enterprise.

Micro-Credit Movement

The most prominent of the micro-initiatives has been the micro-credit movement which has helped in certain contexts to give families and communities sustainable economic activity. There are estimated to be over 3,000 micro-finance institutions globally attracting in the region of 100 million people in some of the poorest communities on earth. Where successful they are noted for the trustworthiness of the transfer of funds and the developmental influence on family networks and women in particular. Using the example of the Grameen ('village') Bank in Bangladesh, A.P. Thirwall in *Economics of Development* comments:

“All credit transactions are discussed openly, so there is complete transparency concerning what is going on. There can be no ‘cover-ups’ and no corruption. The record of repayment to the Grameen Bank is close to 98 per cent of loans; far better than the record of repayment to the commercial banking system where bad debts are rife” (2011: 403).

In 2003 this micro-lender alone had over three million members and across Bangladesh there were over ten million members of micro-credit organisations who would not be considered wealthy enough – those the international financial system labels ‘the unbankable’ – to join normal banking services. With outreach to the poor being an implicit principle of the micro-credit movement, the potential to give marginalised communities a lifeline is very evident. The introduction of micro-credit in many cases gives the poor access to finance with the objective of investing to participate in the local economy in a manageable way. Backed up with technical support on small business activity it provides collateral and employment in sectors of the community that have historically been excluded from commercial activity. It has been particularly beneficial to women and women’s groups in communities where small business start-ups and cooperatives can be a means of escaping poverty and food insecurity.

While there have been more recent adaptations to try and integrate the initiatives into the activities of the global banking system, those remaining loyal to the integrity of the pro-poor micro-credit model maintain a positive intervention in poverty alleviation. A current expansion of the model is the broader and more formal micro-finance, as De Aghion and Morduch explain in *The Economics of Microfinance*:

“Microfinance presents itself as the latest solution to the age-old challenge of finding a way to combine the banks’ resources with the local informational and cost advantages of neighbours and moneylenders. Like traditional banks, microfinance institutions can bring in resources from outside the community. Microfinance is not the first attempt to do this, but it is by far the most successful” (2005: 8).

A further precedent comes from Latin America. In a report for Women in Development Europe (WIDE), Patricia Muñoz Cabrera documented evidence on the role women are playing in constructing alternatives to the neoliberal economic model at the macro and micro levels, including attempts to create a women’s social economy network as a means for micro-development. The concentration on women’s organisations is important in this process because of the organic potential of family and community ties in regeneration, with women empowered. Drawing on the work of WIDE in this regard Cabrera’s conclusion is telling: ‘although alternatives to hegemonic models take a long time before yielding concrete results at the macro level, the thinking and acting to transform unequal patterns of production and consumption has already begun’ (Cabrera, 2012: 84; www.wide-network.org). That is, there is a basis in most communities already for intuitive economic activity.

Is there a role for Higher Education?

Sub-Saharan Africa has one of the most challenging economic environments in the world. With the legacy of colonialism, lack of investment, a need for infrastructural and public sector enhancement, export obstacles and recurrent financial instability, the struggle to encourage economic development across the region has been ongoing and difficult. Nevertheless, economic activity continues across the continent at an informal, social and micro level on a daily

basis and for many countries it sustains the livelihoods of millions (Moss, 2007: 235-238). The fragile nature of African local economies is systemic and could benefit substantially from, as previously suggested, investment in the guise of technical support, capacity building and community level coordination.

Investment can come in a number of ways, not least by utilising the expertise of the formal education sectors and their resources. The training and resources that local institutions can bring to the immediate environment can have an integrating impact with growth potential. Thirwall lists the main ways in which educational institutions can improve economic performance in developing contexts:

“Education improves the quality of labour, and also the quality of physical capital [assets] through the application of knowledge. Education has spillover effects (externalities) on other sections of society which offset diminishing returns to physical capital. Education is one of the most important inputs into R&D [research and development] and for attracting FDI [foreign direct investment]” (Thirwall, 2011: 237).

Educational institutions are usually at the centre of every community, with universities offering additional weight to this by having departments which often specialise in regional and economic development in some guise or another. As far back as the 1980s, there was evidence to show that investment in education with a connection to the development process has disproportionately positive outcomes in comparison with other types of strategic economic investment. Matched with increasing evidence of the organic impact of micro-development initiatives, this combination provides exciting and innovative possibilities.

Furthermore, the achievements of the Millennium Development Goals (MDGs), limited as they are, can be readily enhanced in regions such as sub-Saharan Africa by capacity building and linkage through the higher education sector, their international partners and social enterprise actors. Even a cursory look at the MDGs within this context shows the impact that MSEs can have in local environments on poverty alleviation, education provision, gender equality, healthcare, the environment, and local and global partnership – actions

encompassing all of the MDGs. Building micro-development into the outworkings of the MDGs and enhancing the operations of micro-development initiatives to include the MDGs may also go some way to addressing key concerns from Africa regarding the reasons for limited success to date in implementing the goals (Moss, 2007: 135-6). Further to this, evidence of a disconnection between the MDGs' strategy and trickle-down investment corroborate the argument that macro-systems alone have not worked in the poorest contexts, nor arguably can they work. The problem is summarised forcefully by Development Studies lecturer at the University of Zambia, Chrispin Matenga:

“MDGs can indeed be achieved, but not through the current approach that does not address the inequalities that exist within and between nations of the world. The neoliberal macroeconomic framework in which the MDGs are embedded is essentially a market doctrine in which profit is the overriding objective. These weaker developing countries that cannot compete in the global village can only benefit through minimalist social welfare programmes packaged in the form of MDGs number one to seven. This cannot spur economic growth in the developing world and reduce poverty in the mass of its people” (2011: 79).

The Association of African Universities (AAU) and the New Partnership for Africa's Development (NEPAD) have also recognised the importance of constructing linkages around micro-development and community development, having backed and invested in provision across the sub-continent. This has even gone as far as foundational and innovation investment, training and educational infrastructure support, and building schools with the speculation that these actions will create a dynamic for economic activity from educational institutions outwards into local communities (Lundsgaarde, 2012: 155-58). Coupled with the possibility of inter-university actions, the exchange of knowledge, technical expertise and additional resources, this can provide added impetus for economic stimuli. Furthermore, with academic involvement there is a commitment level that often does not come with macro-economic actors, transnational corporations (TNCs) and intergovernmental departments. The activation of university departments to assist or participate in micro-development

initiatives and social economy projects can create what the Association of Commonwealth Universities (ACU) calls ‘a force multiplier’, meaning that they ‘allow individual institutions to combine their particular strengths into a cohesive and more complete developmental strategy’ (2011: 1).

Universities will often employ development practitioners in the field or from areas in need of a range of investment tools. Every major urban area and many rural areas will have a university or outreach facility. The triangulation of human resources and assets across institutional, community and NGOs actors remains arguably one of the most under-tapped development catalysts in vulnerable regions in sub-Saharan Africa. Both North-South and South-South partnerships at this level can affect capacity building within local economies that macro-economic drivers cannot achieve naturally. It also has the potential of bringing to the economy good practice in management and governance that often elude state agencies. The Africa Unit of the ACU listed the benefits of this consolidation of interests to include: shared ownership, trust and transparency, and mutual understanding and sustainability – all principles that are pertinent to the effective functioning of micro-development initiatives (Africa Unit, 2010).

The beneficiaries of such partnerships include, principally, the recipient communities and social economy, the academics and students at the universities involved, and the business environment in general. Students from participating universities gain access to materials, specialists, ongoing support around employability and entrepreneurship within the context of the local economy. The impact of this can be local and national, with students having the opportunity to use their newly acquired skills upon graduation. This type of initiative assists local community and business leaders to engage with the key themes of social and economic development. They can access local, national and indeed international specialists in a range of competencies and can avail of university resources in order to enhance micro-development practices. University faculty members are impacted upon by the availability of resources and a forum for the development of skills in learning and teaching around the fields of micro-economics, development theory and practice, business law, employability and entrepreneurialism. Together, the agencies involved in these types of micro-development initiatives can assist in the building of optimal

framework conditions for accelerated development (McCann and Matenga, 2011: 6-8; Luudsgaarde, 2012: 159). To put it another way, universities have the potential to offer a lifeline to local community development strategies.

Conclusion

Micro-development in its various guises provides an alternative to formal governmental systems for development. Local level economic activity is diverse and ubiquitous to geographic contexts requiring more innovative mechanisms to enhance the developmental potential. Those involved in small and localised business initiatives have a tendency to operate outside the formal economy and subsequently need smarter, more flexible means of support. This can be bespoke or sectoral, targeted at individual small enterprise initiatives or cooperatives (for example women's groups or NGO-based social economy projects), but essentially risk factors need to be highlighted and risk minimised to ensure that social security is not compromised by enterprise activity. Further to this, with micro-economic initiatives, welfare must be seen to be implicit to the architecture of the model of economic development and by definition they should work to alleviate poverty.

Universities have a potential in micro-development support because of their proximity to communities that are attracted to this model of development and because of the resources, human and actual, that can be tapped into to stimulate local economic activity. They can be a hub for micro-economic activity and provide barriers to the often exploitative mechanisms of macro-economic development. Overall, evidence is growing of the possibilities of this 'bottom-up' approach to development. A range of micro-development initiatives exist, but more investment is needed and more research required into the scope and depth of influence these initiatives can have on actual poverty alleviation vis-à-vis the rebalancing of developing economies.

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PAST AND CURRENT EXPERIENCES OF HIGHER EDUCATION PARTNERSHIP APPROACHES WITHIN THE WIDER CONTEXT OF DEVELOPMENT COOPERATION WITH AFRICA

Peter McEvoy

“Statistical analysis, case study, and common observation all point to the fundamental importance of higher education to development” (World Bank, 2000)

Introduction

Perceptions of the value, role and contribution of higher education and research to the broader domain of international development policy and practice have altered significantly over time and across different donor organisations (bilateral and multilateral). Ireland is a particular case in point: over three decades past, official thinking has ebbed and flowed, on whether and to what extent higher education (HE) and research merit inclusion in Ireland’s overseas development assistance (ODA).

This article traces the vicissitudes surrounding higher education and development that have occurred in that time at the international level, and observes how these have influenced Ireland’s stance. Empirical illustration of the ebb and flow of Ireland’s official-level thinking on HE and development is offered by way of two case profiles of different modalities, separated by an interval of over 30 years. These modalities, in both of which the author had direct involvement, shared a common intention to harness HE capacity and expertise in the service of international development, but were otherwise different. Their differences constitute a reflection, in microcosm, of how HE’s interface with development assistance has evolved over that time.

Higher Education’s Contribution to Knowledge as a public good

Although a well-functioning and accessible system of higher education is not in itself a *sufficient* condition for social and economic development, it is demonstrably a *necessary* one (World Bank, 2000: 93). While respecting Collini’s (2012) caveat against treating economic growth as the overriding

criterion of the societal value of HE, it is clear that Africa's prospects of benefiting from the knowledge society seem greatly impaired without steady expansion, diversification and quality improvement of its higher education capacity.

According to Peters (2006), 'the ideas of regional and international development depend on a nuanced understanding of the meaning of "knowledge economy", and the new spaces and possibilities that have emerged for preserving the university's traditional critical functions and for promoting *public knowledge*' (i.e. knowledge as a global public good, as articulated by Stiglitz (1999)). Thus understanding of the knowledge economy helps frame the discourse on how universities might best respond to new ethical, legal and political responsibilities that have opened up as a result of globalisation. Taking this analysis further, Singh (2001) argued compellingly that higher education must go beyond concerns such as labour market issues or national economic competitiveness (important as these are), and engage in 'broader social and philosophical issues and debates concerning the "public good"'.

Peters' call for a more nuanced view of the 'knowledge economy' is consonant with the earlier critique of the 'knowledge society' concept from an African perspective, by Akilagpa Sawyerr, former Secretary General of the Association of African Universities. He described how the concept's increasing currency gave rise to both positive and negative implications for African institutions:

"On the positive side, the spread of modern knowledge offers possibilities for improvements in the quality of life worldwide, through the better understanding of modern hygiene, nutrition, environmental protection, governance systems, and...the initial conditions for productivity increases in virtually all sectors. On the negative side, one could mention the tendency to political and economic domination by developed economies and their institutions; the increasing homogenization of cultures and threat to local knowledge...and the exacerbation of local differences and inequalities through uneven access to such knowledge and the means for its application" (Sawyerr, 2004: 212).

Even if a rather utilitarian view of the ‘knowledge economy’ is taken, higher education can still be seen as conferring a public good, as well as substantial private benefits such as better employment prospects, increased social mobility. The 1998-99 World Development Report *Knowledge for Development* (World Bank, 1999) proposed an analytical framework emphasising the complementary role of four key strategic dimensions to guide countries in the transition to a knowledge-based economy: an appropriate economic and institutional regime, a strong human capital base, a dynamic information infrastructure, and an efficient national innovation system. Salmi concludes that ‘tertiary education is central to all four pillars of this framework, but its role is particularly crucial in support of building a strong human capital base and contributing to an efficient national innovation system’ (Salmi 2009: 2).

From an economics perspective, Tilak (2007) draws attention to the broader development impact of higher education. His analysis of Indian econometric data leads him to posit four main developmental effects of HE: first, that it enhances earnings, promotes income growth and contributes to economic development (assuming that the brain drain factor is effectively mitigated); second, that it contributes to the reduction of relative and absolute poverty; third, that it negatively influences infant mortality; and fourth, that it is positively related to life expectancy.

Overall, the thrust of the discourse on higher education and development in the past decade or so points to HE having a vital role to play – alongside government and wider civil society – in promoting balanced socio-economic development and poverty reduction. But this convergence of analytical views does not refute the observation that ‘the experience of higher education in developing countries has been disappointing to date; its contribution to social and economic development has not mirrored its accomplishments in developed countries’ (World Bank, 2000: 93). The brief historical review which follows reveals that the attitudes towards HE on the part of both influential donor agencies and of national governments in Africa have oscillated considerably over the years.

African universities post-independence

Following the continent-wide advent of independence in the 1960s, African universities, many of which had been established as a benign legacy of colonial rule, enjoyed a period of growth and national prestige, and were perceived as engines of nation-building and economic modernisation. They were regarded by home governments and overseas donors alike as power-houses of human capital formation, laying the basis for economic take-off. This analysis chimed well with the rather mechanistic ‘linear stages’ model of development economics which held sway in the 1960s, the main advocate of which was Rostow (1960).

In the early post-independence phase of aspiring economic modernisation in Africa in the 1960s, many university posts were filled by expatriate teachers from the global North, while newly-recruited junior indigenous counterparts received fellowships and bursaries to undergo graduate training in Europe, the Soviet Union and the United States (US). At this time, higher education was also seen as important to the process of Africanisation, by producing graduates to replace the expatriate cadres of administrators, managers and professionals. There was national pride in the new national universities as symbols of a new political dispensation: so much so that, over time, governments increasingly asserted their rights to ‘own’ HE institutions, viewing them more as state utilities than autonomous institutions of learning.

A paradigm shift thus occurred as university institutions particularly in Anglophone African countries such as Ghana, Uganda and Zambia moved from a ‘state supervising model’ to a ‘state control model’ (Neave and van Vught, 1994: 12), and as vice-chancellorships and other senior appointments became politicised (Teferra and Altbach, 2003). Francophone African institutions did not experience such a paradigm shift, since from the outset they had approximated to France’s structure of university organisation; this bears close affinity to the state control model, characterised by centralised administrative systems, civil service status of employees, and standardisation of diplomas and degrees (Neave and van Vught, 1994: 12).

Late-1970s to early 1990s: resource depletion in higher education in Africa

From the mid-1970s and throughout the 1980s, a prolonged period of recession hit most newly independent African states, and this exerted disproportionately adverse effects on higher education. Public finances went into prolonged decline as a result of falling commodity prices, energy price increases, Cold War politics, trade barriers, civil conflict, and front line struggles with apartheid South Africa (Szanton and Manyika, 2002). For almost two decades thereafter, public higher education institutions found themselves overstretched by a combination of dwindling resources and rapid ‘massification’ of enrolment. The contraction of the public service for which many graduates were destined (resulting in part from compliance with structural adjustment programmes) led to problems of graduate unemployment and an exodus of young academic, professional and technical talent – commonly referred to as ‘brain drain’. The human capital base of sub-Saharan Africa thus became depleted of key skills in agronomy, medicine, hydrology, pedagogy, applied statistics, law, public administration, journalism, engineering, business and commerce.

Meanwhile scepticism began to grow among international donors about the merits of public investment in higher education in less developed countries. The contribution of higher education to economic and social development *relative to other priorities* became sharply contested. In particular, two papers (Colclough, 1982; Psacharopoulos and Tan et al., 1986) analysed the contribution of education to economic growth, and the relative costs and benefits associated with different levels of education. The latter of these studies, a World Bank Staff working paper, based its analysis on earnings differentials, and drew comparative conclusions about the private and social rates of return per capita on investment in different levels and types of education. The main conclusions drawn were that the greatest rate of return accrued to primary education, followed by secondary, with third level deemed to be the least ‘efficient’ form of investment in education.

This view, favouring preferential if not exclusive investment in primary education, exerted a profound influence on public policy thinking within individual countries of the developing world, and more importantly at the

influential 'Education for All' (EFA) conference in Jomtien, Thailand in 1990. The World Bank Staff Working Paper of 1986 had after all asserted that in most developing countries 'the present financing arrangements constitute a misallocation of resources devoted to education because "higher education was the relatively less socially efficient investment"' (Psacharopoulos and Tan et al., 1986: 9-10). This finding was widely quoted and exerted considerable influence on the lending policies of the World Bank itself, on domestic priority-setting by governments at country level, and on the aid strategies of international donors for almost two decades thereafter.

Segmented versus Holistic Approaches to Education Sector Support

Undeniably, investment in basic education is both an inalienable right and imperative for sustainable development in sub-Saharan Africa and elsewhere. The Jomtien 'Education for All' conference was important in that it gave expression to the consensus of the international community in this regard, and - importantly - triggered an annual peer review process which has continued ever since in the form of the Education for All Global Monitoring Reports, under the aegis of the United Nations Educational Scientific and Cultural Organisation (UNESCO). The dramatic improvement in gross enrolment rates throughout the developing world over the past two decades is an eloquent vindication of the positive impact of the legacy of Jomtien. However, much remains to be done in terms of improving the quality of educational delivery at all levels in significant areas of the developing world especially sub-Saharan Africa. Meeting this challenge in turn requires sustained investment in capacity development in educational research, statistics, and policy analysis - expertise that is transmitted via higher education. This illustrates the kind of structural problems which arise when higher education is divorced from a 'total system' holistic approach to policy and planning (King, 2009).

The difficulty for the higher education sector was that the Jomtien process became conflated in the minds of many policy-makers in the developing world, in multilateral institutions and in some bilateral donor agencies, with the contemporaneous critiques by Colclough, Psacharopoulos and others, asserting that government spending on higher education was both socially regressive and relatively less efficient economically. Underlying such analysis was the tendency towards an unduly arbitrary segmentation of education according to levels, and a

consequent loss of a 'total system' perspective towards the education sector, whereby the inter-dependence of different sectors and levels of education could have been better recognised and acted upon. It also ran counter to the more integrationist view of higher education's role in development which has begun to re-emerge in more recent years and which is discussed later in this paper.

The essential inter-dependence between the different levels of education can be demonstrated very clearly with reference, for example, to the second Millennium Development Goal (MDG) - achieving universal primary education. In the final analysis, how can this goal be realised without high-quality teacher education, accompanied by properly moderated state exam systems, a rigorous school inspectorate, reliable management information and other associated infrastructural frameworks? These ingredients all link directly back to the indispensable role of higher education as a repository of expertise and builder of capacity for these very functions. The same rationale holds true of the other key sectors of health, water, sanitation, and agriculture and food.

An endorsement of this more rounded view of things is discernible in the influential *Report of the Task Force on Higher Education* (2000), which though commissioned by the World Bank, distanced itself from - and superseded - the earlier orthodoxies which had 'relegated higher education to a relatively minor place on its development agenda' (World Bank, 2000: 39). The earlier basis of calculating the social rate of return was shown to have been unduly restrictive and individualistic in its calculation of efficiency, relying largely on relative earnings data. The resultant cost-benefit analysis was distorted, in that it under-valued the indirect benefits of education to society ('externalities'), and so failed to reflect the 'public good' created by higher education. But in the meantime the damage was done:

"For the following twelve to twenty years, depending on the country, University faculty salaries remained flat or declined, research funding dried up,...university libraries stopped purchasing books and journals, physical facilities crumbled, new building was terminated,...student scholarships were largely eliminated...and new faculty hiring was curtailed" (Szanton and Manyika, 2002: 1).

The onset of the HIV and the AIDS pandemic further depleted the human resource base in higher education in sub-Saharan Africa (Ashcroft and Rayner, 2010: 37; Kelly, 2001).

Irish-Africa Case Studies in University Cooperation: personal reflections

(i) Case Study: Higher Education for Development Cooperation - HEDCO

It was against the backdrop of this sharp decline in the fortunes of HE in Africa in the 1970s that most European donors included in their development aid budgets provision for support to higher education infrastructure, graduate training and partnerships. In Ireland's case, Higher Education for Development Co-operation (HEDCO) was established in 1978 with this remit, and with strong political and financial support from the growing bilateral aid programme administered by the Department of Foreign Affairs (Development Cooperation Division).

HEDCO's main objective was to promote the development of higher level skills and expertise in developing countries (particularly the 'priority countries' within Ireland's bilateral aid programme), in response to clearly identified needs or gaps. HEDCO's primary instrument for achieving this was institutional capacity building through technical assistance linked to counterpart training, and institutional twinning between Ireland and Africa. Its development approach was governed by the twin objectives of (a) *responsiveness to the local needs and conditions in-country*, and (b) *the nurturing of self-sufficiency in institutional capacity in-country*.

HEDCO had at its disposal the expertise of its member colleges in Ireland, as well as of specialist bodies (such as the Higher Education Authority and the National Council for Educational Awards) and research institutions (such as the Educational Research Centre, Drumcondra). This expertise was harnessed towards the development, management and assessment of programmes mainly in Anglophone Eastern and Southern Africa, in projects such as:

- establishment of new – or expansion of existing – institutions, faculties, departments and units within universities and institutes of vocational and higher education in the developing world;
- technical assistance for course development (mainly undergraduate) and curriculum design across disciplines considered relevant to the host country’s development needs, drawing on expertise of institutions in Ireland;
- study fellowships in Ireland for staff development for teaching personnel of host institutions (mainly at Masters level), and their temporary substitution by experienced lecturers from Ireland where necessary for continuity of teaching;
- commissioned research and consultancy for educational reform and policy development for ministries, curriculum and examinations councils, etc;
- other forms of institutional development based on identified training needs.

Throughout the late 1970s and early 1980s, HEDCO’s project portfolio expanded in step with the growth of the Irish Aid programme. The track record thus acquired in integrated project management enabled it to enter competitive tenders for the award of technical assistance contracts by multilateral agencies. For example, in 1983 HEDCO successfully tendered for the largest overseas technical assistance project hitherto awarded by the European Commission. By 1985, HEDCO’s secretariat had grown from three to eight personnel, and was administering projects valued at IR£2m (€2.5m) per annum, about two-thirds of which were Irish Aid funds, and the remaining third represented contracts awarded by the European Commission, the World Bank, and United Nations (UN) agencies. By 1995, HEDCO had undertaken projects in over 30 countries world-wide across a wide disciplinary spectrum, including:

Accountancy	Food Science and Technology
Agriculture and Agricultural Extension	Hotel and Catering Studies
Business Studies	Mathematics
Biotechnology	Marine Sciences/Aquaculture
Computing & Information Systems	Medical Laboratory Science
Economics	Medicine and Dentistry
Education	Police Training
Engineering	Teacher Training
Environmental Science	Veterinary Medicine

However, from the mid-1990s, HEDCO's project portfolio began to contract and its fortunes as an organisation went into gradual decline. By 2002, it had become practically defunct as an actor in the realm of international development although it continued to exist as an entity for some time thereafter having rebranded itself as 'International Education Board of Ireland' (IEBI). This title reflected a fundamental shift of focus away from development co-operation toward generic marketing of Ireland as a destination for fee-paying international students. Although the reasons for the agency's decline and ultimate demise have never been independently analysed, the external factors discussed below offer at least a partial explanation.

HEDCO's decline can firstly be attributed to the influence exerted at domestic level by the multilateral-level donor thinking post-Jomtien (outlined above), epitomised by the stance of the World Bank 'that its lending strategy should emphasise primary education, relegating higher education to a relatively minor place on its development agenda' (World Bank, 2000). Even though this position became more modulated by the mid-2000s, this re-think came too late for HEDCO to be salvaged.

Secondly, an Organisation for Economic Co-operation and Development-Development Assistance Committee (OECD-DAC) Peer Review of Ireland's aid programme which took place in 1994-95 was critical of what it considered to be the relatively high proportion of the Irish Aid budget absorbed by external technical assistance including Irish-originating personnel assignments overseas, such as those managed by HEDCO, by the State Agencies Development Cooperation Organisation (DEVCO), by the Agency for Personal Services Overseas (APSO) and by the Department of Foreign Affairs itself. The DAC Peer Review questioned the sustainability of this modality, and voiced concern lest the perceived quality of Ireland's overseas development assistance could be diminished if it were to become supply-driven and if personnel and institutions were seen as the ultimate beneficiaries of public money ostensibly designated for overseas aid. The Review calculated that 17.2 percent of bilateral ODA from Ireland was spent on technical assistance in 1991, compared with a DAC average of 12.1 percent (OECD, 1993). This echoed a wider ongoing debate and re-examination of the value of technical assistance as a modality in development cooperation, questioning whether it was conducive to the development of national capacities (e.g. Ridker, 1994).

Irish Aid smarted from the OECD-DAC criticism at the time. Although expatriate technical assistance was a common modality used by Irish Aid throughout its programme (not just in respect of HE), the doubts about the merit of higher education support became conflated with growing momentum within Irish Aid to embrace what Murphy (2012: 150) considers to have been 'the most significant policy change since Irish Aid was established'. By the late 1990s, Irish Aid evinced an emphatic move away from funding individual projects to working programmatically through government systems in partner countries, and utilising modalities of aid delivery such as in-country budget support, sector wide approaches and multi-donor 'basket' funding.

As King (2009) observes, the continuation of support to HE could have been deemed consistent with the adoption of these new modalities of aid delivery; indeed some donors (e.g. Nordic countries and Netherlands) adhered to such a compatibilist view and maintained continuity of support to higher education and research:

“There were contradictory tendencies at work in the agency world: at the very time that their agenda seemed to prioritise basic education, agencies were also adopting the discourse of sector-wide approaches, which suggested that there was concern to reach agreements with governments that were intended to cover the whole of the education sector, and not just primary schooling” (King 2009: 34).

(ii) Case Study: Irish African Partnership for Research Capacity Building (IAP) 2008-2011

The policy pendulum within Irish Aid, having swung decidedly away from supporting HE in the late 1990s, took a significant corrective move back in favour thereof in 2007, with the launch of the *Programme of Strategic Cooperation with Higher Education and Research Institutes*. Indeed, this initiative could be seen as an example of the compatibilist donor practice implied in the quotation above from King (2009: 34). It can also be seen in the context of a wider trend among the donor community in the preceding years to rehabilitate higher education once again within the architecture of ODA, as major international players recognised the critical role played by HE for integrated socio-economic development and for genuinely sector-wide approaches to education. (Teferra and Knight 2008; Bloom and Canning et al., 2006).

One of the projects funded under the *Programme of Strategic Cooperation with Higher Education and Research Institutes* was the Irish African Partnership for Research Capacity Building (IAP) as a consortium of Universities Ireland (which embraces nine institutions across the island) together with partner institutions in Tanzania, Uganda, Malawi and Mozambique. Almost four years of wide-ranging work was undertaken with funding support from Irish Aid. In that time, the project spearheaded some internationally significant research and analysis of a quantitative and qualitative nature, focusing on the factors which promote and inhibit the development and retention of development-focused research capacity in both the African and Irish contexts. For example, one of the components of the project involved a comprehensive Stakeholder Consultation (Barrett, Conway et al., 2010) with over 300 research personnel and HE managers, mainly in Africa, involving structured one-to-one and group interviews. In approaching this work, themes

were identified in the IAP consultation process which aligned strongly with Irish Aid's policy priorities – poverty reduction, food security, health promotion, gender equity, and adaptation to climate change.

Emerging from the findings (Barrett, Conway et al., 2010) are five key factors which together make up the ingredients for sustainable and successful research capacity building at institutional level (these points are not necessarily in order of priority):

1. The development of an embedded research culture within the African partner institution; one which sets its store not solely by the number of international peer-reviewed publications (important though this is), but including also the contribution of research to effective teaching, learning innovation, and civic engagement.
2. The establishment and effective functioning of a research office which can take research from conceptualisation through to dissemination and manage the research process across the institution, and which can actively encourage 'integrative' cross-disciplinary collaboration across traditional subject boundaries.
3. Increased activity of international North-South and South-South partnerships and networking; a prime example of the latter form of valuable regional-level networking is the emergence of East Africa Research and Innovation Management Association (EARIMA), bringing together Tanzania, Kenya, Uganda and Rwanda.
4. The development of effective research infrastructure, in particular electronic connectivity facilitating on-line access to global research; this is now being facilitated with the advent of new physical infrastructure such as SEACOM and TEAMS, the emergence of National Research and Education Networks (NRENs) at country level.
5. A steady increase in research training, in particular through more and better structured modalities of postgraduate formation and stronger foundation in research methods (quantitative, qualitative, critical

thinking) and cross disciplinary collaboration. The use of a highly structured foundation year of pre-doctoral preparation is one example of this, and has been refined by the South Africa based NGO, SANTRUST.

A strong message underlying IAP's several regional-level training events on research capacity building was a growing consensus around the need to more closely align academic research priorities to the major global challenges of our time, such as poverty reduction, food and water security, health promotion, conflict transformation, and resilience to climate change. As socio-economic development becomes more knowledge-intensive, higher education has a vital role to play – alongside government and wider civil society – in promoting human development, in a way which puts peoples' needs first, and which has poverty alleviation and – beyond that, poverty eradication – as its overarching goal.

Comparisons and Contrasts

These reflections on HEDCO and IAP, separated as they were by an interval of some two decades, reflect in microcosm some changes in (1) *characteristics* of higher education partnership-working over that time, and (2) particular *challenges* that have emerged.

(1) Characteristics

Most notably there has been a pronounced shift in the level at which support to higher education is targeted. In the HEDCO days, the focus was on strengthening undergraduate teaching capacity, whereas latterly that emphasis has moved more towards graduate training and research capacity strengthening. This partly reflects the success of the earlier investment a generation previously in strengthening undergraduate teaching capacity. A second factor is the generational transition, in that an elder generation of African academics now reaching retirement age has created a need for a new cadre trained to fourth level. A third factor has been the significant volume increase in student enrolment, and the associated expansion of faculty: the total number of students pursuing higher education tripled from 2.7 million in 1991 to 9.3 million in 2006 – an annual average rate of 16 percent (World Bank, 2010: 2).

These factors combined mean that new modes of graduate training are being implemented, with emphasis on cost-effectiveness and student retention in-country or in-region. Accordingly, non-conventional options are being embraced, such as sandwich-type PhDs, joint supervision and distance mentoring. In this context, a recent study, which is also a product of the *Programme of Strategic Cooperation with Higher Education and Research Institutes*, explores in a comparative and empirical way three distinct models of PhD provision (Uduma and Glavey, 2012) and highlights their relative strengths and weaknesses.

Another significant emphasis emerging from the more recent experience of higher education partnership-working has been an emphasis on translation of research into wider policy and practice. Historically it has proved difficult for policy-makers and other stakeholders to identify *which* policies are most suitable when dealing with national priority issues, and to ascertain *how* policies can best be implemented in situations which differ widely. The most obvious difficulty is that of precisely attributing cause-and-effect. Despite these inherent problems, the developmental imperative of ensuring a better quality of life for the poor calls for a better understanding of how higher education, understood as a public good, can contribute to pro-poor policies and help improve development outcomes.

Finally, the improvements in information and communications technology that have taken place during the past twenty or so years have transformed the logistics of implementing programmes of partnership. This can enable collaborative research between counterparts in the global North and South to be undertaken with lower transaction costs and with greater rapidity of response than was previously possible.

(2) Emerging Challenges

Challenge 1: Crowding out of the limited space

As the number of institutional partnerships grows, the ensuing demands which these exert on the southern partners' institutional resources is considerable, in terms of time, funding, and infrastructure; equally so are the demands made in terms of the institutional dynamics of maintaining cross-cultural and equitable partnerships, in terms of cohesion, complementarity, and priority-setting. As

Teferra observes, 'the body of development partners involved in African higher education is rich and complex....While entertaining a variety of partnerships is an ideal situation, it could become a daunting task for receiving countries and their institutions' (Teferra and Knight, 2008: 51). Such overload may be particularly pronounced in countries with a limited number of 'partnerable' institutions in the region that tend to attract more interest from the global North than they can be successfully managed at one time.

Challenge 2: Bridging the gap between policy and research

There is increasing interest among both researchers and policy-makers in forging a stronger continuum between development research and development policy. Both parties are interested in better understanding what works, and herein lies an opportunity for HE institutions to provide rigorous, evidence-based independent analysis. Many research findings could be more readily available to inform policy-makers on, for example, poverty prevalence, HIV/AIDS, unemployment, better quality health and education, and service delivery. However this researcher-policy maker dialogue will inevitably have to contend with diverging expectations, in relation for example to realistic timescales for outcome-oriented research work, and the reliability and predictive value of any policy-related conclusions to be drawn from available evidence.

Challenge 3: Language

Sometimes the higher education sector fails to do justice to its own indispensable contribution to human development, partly because the language of discourse which it tends to use is not fully shared with those who are more directly engaged in policy and practice. Perhaps the description of a research question or hypothesis tends too often to be couched in terms which are accessible to the academic or specialist peer audience, to the exclusion of a more generalist audience who might well be enthused by the potential of a research application to transform livelihoods or to be a catalyst for social change. Perhaps also the mechanisms for disseminating research findings which are of potential importance to development policy and practice need to be broadened beyond the traditional peer-reviewed journals, to include web-based resources and broadcast material. The implications of such an approach for conventional structures of academic recognition and reward pose a significant challenge.

Challenge 4: Promoting quality assurance

Enrolments in African HE are rising rapidly, in both public and private higher education institutions, but although student numbers tripled in the fifteen year period 1991-2006, with an average annual increase of 16 percent, public resources allocated to current expenditure in that sector only doubled – an annual average rate of 6 percent (World Bank, 2010). In response to resultant concerns about dilution of quality of teaching and learning, attention has begun to be focused in recent years on establishing quality assurance systems at institutional and at national levels. Although there have also been some tentative moves towards regional quality networks, the main concern has been with recognition and assurance of domestic higher education programmes. The challenge remains a formidable one even since 2008 when Knight stated: ‘the question now facing the sector is how to deal with the increase in cross-border education by traditional HEIs and the new private commercial providers who are not usually part of nationally-based quality assurance schemes’ (Teferra and Knight 2008: 37).

Conclusion

Having traced some of the significant modulations in the discourse around higher education’s value and contribution to international development over three decades past, and the implications of these vicissitudes for sub-Saharan Africa, this article introduced two short case studies (HEDCO and IAP). These serve to illustrate how the pendulum-like swings in sentiment towards HE as an essential component of a balanced development strategy played out in the specific context of Ireland’s overseas aid profile.

To conclude, the sceptical stance adopted by some prominent analysts in the 1980s and 1990s regarding the (de)merits of support to higher education and research has since been superseded by a convergence of views in support of the proposition that HE and research have a vital role to play – alongside government and wider civil society – in promoting balanced socio-economic development and poverty reduction. Recent and current development discourse tends to acknowledge that the different levels of education inter-lock with one another, forming a continuum, and as a corollary subscribes to a ‘total system’ approach to policy and planning within the education sector as a whole. Moreover, higher education is increasingly seen as a repository of expertise and

builder of capacity for myriad functions essential for integrated development, such as health, water and sanitation, agriculture and food.

There are three lessons which may be drawn from the reflections in this article. The first is that future aid programming should incorporate HE and research capacity support as an integral feature, within the broader aid effectiveness framework. The second lesson is that Ireland's contribution in this respect should inform, and be informed by, shared intelligence among like-minded donors around what constitutes good practice (the European Donor Harmonisation group on HE is of potential value here). And thirdly, that nurturing institutional partnership of medium to long-term duration should be a cornerstone of an effective strategy to harnessing HE and research in the service of development. The following quotation neatly sums up the ethos most likely to make such partnerships effective and of enduring benefit:

“Neither researcher, administrator nor villager is likely to achieve his or her potential for contribution to development until they join as partners in a mutual learning process, committed not to the search for magical blueprints, but to the building of new capacities for action” (Korten, 1980).

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STRENGTHENING RESEARCH IN AFRICAN UNIVERSITIES: REFLECTIONS ON POLICY, PARTNERSHIPS AND POLITICS

Jonathan Harle

Introduction

Fifty years after independence, 50-60 years on from the founding of the first (colonial-era) university colleges, and having survived the ‘crisis’ decades from the late 1970s, international interest in African higher education (HE) is higher – and broader – than ever before. Since the late 1990s, when higher education returned to the African development agenda, there have been renewed appeals from African and non-African scholars to development agencies and other donors to assist in rebuilding the continent’s research system. Partnerships with universities in Europe, North America and elsewhere have been offered as one mechanism through which this might be achieved. Others have included direct support to specific universities, disciplinary and interdisciplinary research networks, and regional collaborative programmes for research or postgraduate training.

This paper offers some reflections on research capacity in African universities and attempts to set partnership initiatives in the broader context of African HE policy and funding. A number of themes intersect here, including the push to ‘internationalise’, concerns for ‘excellence’, the focus on ‘world class’ research training and staff development, and the role of HE in development more broadly. The article does not set out to interrogate the success or otherwise of partnerships, nor does it seek to problematise the idea of partnership itself, which has been done extensively elsewhere (Samoff and Carrol, 2004; King, 2008; Bradley, 2008). Rather it is an attempt to explore some dimensions of an area to which partnership is often applied – research capacity – and to locate this within a broader set of debates.

The article draws in particular on what has been dubbed the ‘Nairobi Process’, a consultative exercise initiated by the Association of Commonwealth Universities and the British Academy in 2007, which has sought not only to identify practical ways in which scholarship has been reinvigorated, but also to

move beyond the emerging technical, macro-level policy reports, and to explore what the suggested changes would mean for deans, departmental heads, and researchers (Harle, 2009; 2011). As this article argues, supporting research requires an understanding not only of specific needs – greater numbers of PhD-qualified staff, or better resources for research – but also the ways in which research is undertaken; something of the institutional environments in which academics work; and the broader currents of policy, national and international, which advance or hamper scholarship, and which determine opportunities for collaboration within and across borders. While external support is valuable, and international collaboration vital, African universities need to be able to define and pursue their own ambitions: access to foreign funding, and an increasing involvement in the networks of international scholarship can at once enhance and restrict their ability to do so.

External involvement in African higher education

External actors have had a substantial influence on the trajectory of African HE since the colonial-era during which the first universities were established in many countries (Lulat, 2003), with several established as colleges under the auspices of European parent institutions. The history of the World Bank's involvement – from neglect to renewed interest in African HE, and its significant influence on other actors, including as a producer of much of the body of research on education and development for many years – is particularly well told (Samoff and Carrol, 2004; Lebeau and Mills, 2008; King and McGrath, 2012). Characterised broadly, from the mid-1970s the Bank came to see HE as a predominantly elite concern, generating private gains and thus a lower priority for public funding; the 1990s saw this position soften considerably, as the Bank acknowledged both the role that HE had to play, and the public benefits which it generated (World Bank, 2000; 2002; 2008). Many bilateral agencies also have long histories of involvement through scholarship programmes or institutional grants, and with the agencies of the Nordic countries, Japan and Canada being notable (Roberts, 2005). The Swedish International Development Agency (Sida) has, for example, maintained a long-standing programme of support to a number of east and southern African universities. There have also been many partnerships, albeit small scale in nature, between individual academics. Renewed interest in African HE in the

last decade or so has helped to encourage a range of new funding commitments from donors, and a surge in initiatives, networks and ambitious programmes.

While international funders have played a vital role, HE has also received much greater prominence in the strategies of African regional bodies. The New Partnership for African Development (NEPAD) has co-sponsored a number of specialist research centres, while the African Union's flagship project is the creation of the Pan-African University, with nodes in each of the sub-regions, and at already established universities. By encouraging the entry of new private providers, and creating new or upgrading existing public institutions, individual governments have also done much to change the HE landscape in the last ten years or so.

Growth, expansion and quality

Although enrolment figures for African tertiary education as a whole indicate only a modest growth of two percentage points, from 4 percent to 6 percent in the ten years to 2009, this represents a massive increase in actual numbers of students. Annual growth rates are well into double figures in many countries, reaching 28 percent in Tanzania, 44 percent in Ethiopia and 61 percent in Rwanda (Mohamedbhai, 2008). A growing middle class, the success of efforts to expand primary and secondary education, and a discourse which emphasises tertiary qualifications as a means of considerable personal advancement have led to growing demand for university places. Government responses have typically been twofold: to push public institutions to increase the number of student places they offer each year; and to loosen regulatory controls enabling private institutions to emerge in order to cater to the demand, absorbing those who can afford to pay. In Kenya, the number of HE institutions has increased to forty-four universities and twenty-six constituent colleges in 2013, (Commission for University Education), while neighbouring Uganda has thirty-four universities, public and private (National Council for Higher Education). Both had just one university college at independence, in 1963 and 1962 respectively. Nigeria's National University Commission now accredits 128 institutions, a growth from just five at the end of 1962, its independence year (National Universities Commission).

However, institutional growth and expansion of access have less often been accompanied by additional funding. In many cases the costs of new places have been met by the introduction of student fees, with parallel streams of government scholarship and privately sponsored students in public universities, but with little additional investment in the facilities needed to support these growing student populations. Kenya offers a useful example. In 2010, the government announced a two-fold increase in its subsidy to the country's seven public universities, from US\$360 million to US\$640 million. However, 80 percent was projected to be swallowed up by recurrent expenses (such as salaries) and a large proportion was slated for thirteen new constituent colleges which were to be created under the seven existing universities (Nganga, 2010). The government also announced that universities would be expected to double their intakes, from 20,000 to 40,000 for the next two years (Muindi, 2010). While some new money has been found, modest increases have been outstripped by the pace of expansion: the government subsidy has reportedly increased by around 4-5 percent annually over the last five years while enrolments have reportedly risen by 40 percent each year (Nganga, 2010). The quality of education and the time and resource to undertake rigorous scholarship have been further hit as a result.

Strengthening the foundations for research

As the growth in undergraduate enrolments indicates, one of the greatest challenges that African universities face is in developing the quality of teaching provision. There is nevertheless an urgent need to improve research too. Research activity has suffered significantly as a result of the funding cuts already described and of the more recent surges in student numbers. Led particularly by bilateral and research funding agencies, and linked to substantial new investments, there have been several recent efforts to understand what is needed to improve 'research capacity', identify needs and in some cases offer more detailed frameworks to implement and monitor capacity initiatives (Jones et al., 2007; Barrett et al., 2011; DFID, 2010; Bates et al., 2011; ESSENCE on Health Research, 2011; Vogel, 2012). Capacity has also been explored through parallel and closely related projects but which are not restricted to the HE sector (Ortiz and Taylor, 2009). Notable is an emerging consensus that, despite obvious technical aspects of improving research – from infrastructure to skills – capacity

is complex. Enhancing research capacity is a long term process, dependent on relationships and trust between people, and influenced by cultural values and political processes. It can often involve challenges to established structures of power and authority within an institution or the wider system.

At the heart of these initiatives are questions about what a strong research institution looks like; what a researcher needs to be able to work effectively and produce work of quality; what the wider research system needs to do in order to support this; what is needed at the disciplinary (or interdisciplinary) level to enable research in specific areas; and how can schemes be designed to address all or some of these needs. As several reports have noted, for research to be strengthened, and for gains to be sustained, several levels of capacity need to be addressed. Individuals need to be supported, through training and staff development; research institutions need the necessary facilities, resources, management and leadership; and policies and funding must exist at a national level, supporting and enabling organisations to prosper and individuals to advance their careers.

Many accounts of the constraints to African research centre on a lack of funding. While insufficient public investment pushes some institutions into serious difficulties, and while a lack of research grants makes it difficult for researchers to undertake new work, the obstacles to research are more than financial; the ways in which research is managed at institutional level is critical. Ineffective stewardship of existing resources can limit the potential of new investments, while also reducing funder confidence. Indeed, as Cloete and colleagues put it:

“The lack of knowledge production at Africa’s flagship universities is not a simple lack of capacity and resources, but a complex set of capacities and contradictory rewards within a scarce-resource situation. This results in a fundamental lack of a strong output-oriented research culture at these universities” (Cloete et al., 2011: 34).

Consultancy and the dynamics of research

The consultancy character inherent in many African universities is commonly identified as a particularly damaging condition. Limited funding for research,

poor salaries, and the dysfunctions of the university system for many years, coupled with the presence of many development agencies and non-governmental organisations (NGOs) seeking African expertise to advise and/or evaluate policies and programmes, has led many academics to pursue consultancy work in the place of what might be considered more academic work. With limited technical expertise in many policy sectors governments have also become significant clients of university academics.

Levels of consultancy are always hard to gauge, since such services are rarely run through university accounting systems. A survey in southern Africa suggests that around 62 percent of academics are engaged in consultancy work (Mouton, 2012). While the offering of consultancy services is an inevitable – and in some cases valuable – academic practice, problems arise when there are few academics left or willing to supervise and mentor, and when research activities rarely result in formal publication. As an informant interviewed by Wight at a Ugandan university commented: ‘most of our social scientists are not institution based.... They are there for hire’ (Wight, 2008: 115). According to Mouton (2010), this leads to a dangerous situation of ‘de-institutionalisation’, where academic work becomes an individual enterprise, with cultures of collegial inquiry and academic mentoring eviscerated in the process.

In and of itself, the undertaking of consultancy work is not necessarily the problem. Academics the world over have been encouraged to market their expertise in this way by universities seeking to diversify income, or by clients offering substantial fees. Indeed, it is an inevitable development, and can even be productive; as many academics argue, it enables them to address vital social policy questions, undertake fieldwork and gather new data (Harle, 2009). The problem lies in the balance between commissioned work and the pursuit of critical scholarship – particularly in the humanities and social sciences – and the extent to which consultancy takes academics out of the university environment and away from teaching, supervision and mentoring.

A number of writers have argued that there are also real epistemological reasons why consultancy can cause problems for African research. Thus Samoff and Carrol (2004: 108) argue that the ‘very process of organising research as consulting undermines the dynamism and institutional

autonomy of research centres' as scholars do not set their own agendas or determine their own approach. Similarly, Mamdani (2011) points to the danger of framing research as a response to problems defined by clients, rather than by the identification and formulation of questions.

The visibility of African research

Measuring research activity is difficult when data collection and reporting is often poor at university and national level, forcing a reliance on imperfect international indicators which tend to under-represent African scholarship. The fact that African research currently accounts for a fraction of international research output is regularly observed. Figures from the Thomson-Reuters ISI database suggest that African research accounts for just 1.1 percent of world publications (Mouton, 2010). These suggest that the continent's output has also declined in relative terms since the late 1980s, with Africa losing 11 percent of its share of global output between 1987 and 1996 and not recovering (Tijssen, 2007). South Africa tends to account for much of this visible output. These figures nevertheless ignore much Francophone and Lusophone work, and particularly overlook work published (in any language) in national or regional journals which are not indexed by the ISI. Taking the journals indexed by African Journals OnLine (AJOL), for example, there were almost twice as many 'local' as compared to ISI qualifying articles in the ten years to 2007 (Mouton, 2010).

Measuring research activity in this way – by the number of articles in high-impact journals – may also act to systematically under-represent much African research, which targets not the international scholarly community but research users – academic or other – at national and sub-national level (Willmers, 2012). Nevertheless, these figures do offer some indication of the struggles that African researchers face as they seek to participate in and be recognised within the international research community. Perhaps most telling is Mouton's calculation that only seventeen universities within his sample were able to produce an average of twenty papers a year or more (2010).

The strength of the academic core

A major constraint to African research – and to quality teaching too – is the strength of its academic staff; particularly the number of staff holding doctorates.

It is not uncommon for courses in some universities to be taught by holders of masters degrees, and in some cases bachelors, while those with PhDs are often unable to develop research alongside heavy teaching and administrative loads (or unwilling to do so when consultancy offers a more attractive option). Compounding this is the so-called 'greying of the professoriate'. Many years of under-investment in training new cohorts of academic staff have led to an age profile skewed towards those at a late stage in their careers (Tettey, 2010: 10).

By way of example, Ghana as a whole has just 28 per cent of PhD-qualified staff, while Uganda has just 12 per cent (Tettey, 2010). These figures nevertheless disguise a number of underlying complexities. For example in 2007, the universities of Ghana, Dar es Salaam and Nairobi reported high levels of doctoral qualifications amongst academic staff (of 47 percent, 50 percent and 71 percent respectively), while Makerere, Botswana and Eduardo Mondlane had much lower levels (32 percent, 20 percent and 19 percent respectively) (Cloete et al., 2011). That each is often regarded as the top national research university in its country, and often bears the greatest responsibility for training academics for the country as a whole, is particularly significant; the proportions of PhD-qualified staff are often lower outside these institutions. The rapid growth of a private tertiary sector has also accentuated divides in some countries. One calculation for Kenya puts the difference at 39 percent of staff with doctorates at public universities compared to 21 percent for private institutions (Opata, 2011), while for Ghana the figures are around 30 percent and 17 percent respectively (Tettey, 2010).

Developing the next generation

One of the greatest obstacles preventing African universities from upgrading the qualifications of their staff, and from producing new generations of research students, is the continuing inability of many institutions to mount high quality doctoral programmes, requiring many to study abroad. Although undergraduate enrolments have soared, postgraduate growth rates have been less pronounced. In 2007, for example, only 6 percent of postgraduate enrolments at the University of Ghana were on doctoral programmes (Tettey, 2010). Supervisory capacity – i.e. having sufficient numbers of experienced staff, and their preparedness to offer effective support – is a particular barrier. Unlike

additional teaching or external consultancy work, supervision rarely attracts additional reward, monetarily or otherwise.

A number of relatively innovative models for doctoral training have emerged, whereby constraints are overcome through a process of dual supervision, i.e. split-site programmes whereby candidates spend a portion of time at a better-resourced institution (often in the North), or on collaborative programmes at a regional level, such as the long-established African Economic Research Consortium or the more recent public health Consortium for Advanced Research Training in Africa. Nevertheless, the potential for split-site programmes is still limited where there is insufficient capacity at the home institution. Even where universities are able to mount their own doctoral programmes, progression and graduation rates may be relatively weak. Cloete et al. (2007) indicated that the University of Botswana graduated four PhDs from its own programmes in 2007, while the universities of Dar es Salaam, Ghana, Makerere and Nairobi managed to graduate between 20 and 32 PhDs in the same year, across all disciplines.

Enabling successful post-PhD careers

The foundations laid at doctoral level are clearly critical but while much attention has been rightly focused on the need to produce greater numbers of PhD students, and to upgrade the qualifications of junior academics to this level, the needs of researchers in the immediate post-PhD years are often neglected. Investments in doctoral training are often under-realised as a result. Many of those who do return home, having completed PhDs abroad, or who are able to gain PhDs on local programmes, struggle to find supportive and productive spaces in which to advance their careers, and their universities lose as a result. Early career researchers consulted during an ACU and British Academy study (cited above) reported feelings of 'intellectual isolation' and 'intellectual meltdown' (Harle, 2011). While access to research funding is important, difficulties of career progression are often the result of barriers at institutional level, where university structures and policies do not make explicit provision for the needs of emerging researchers (assistance in getting work published, writing grant applications or learning how to supervise students of their own), or where departmental cultures do not enable their junior faculty, or encourage a spirit of collegiality and intellectual inquiry.

Being ‘world class’ and being relevant: from international rankings to national needs

Of course efforts to strengthen capacity do not exist in a vacuum. The growth and renewal of African HE is tightly bound to two twin sets of concerns: on the one hand ‘relevance’ and ‘development’, and on the other ‘excellence’ and ‘international standing’. African universities have long had to balance these competing demands, which have often proved difficult to reconcile. The first requires that they demonstrate their relevance as institutions, by showing how they serve national development needs; the second requires that they build up strong research systems in order that they can claim a place in wider networks. How universities negotiate these often competing concerns, and where they place their emphasis, is important in determining both what becomes possible and how success or otherwise is assessed. The tension between relevance and standing has been further heightened by the rise in global university rankings, and the concern for ‘world class’ status.

Attempts to characterise what a ‘world class’ institution looks like tend to emphasise high concentrations of talented academics: mobile, connected to international networks, with strong publication records, significant budgets, and strong strategic vision and leadership (Altbach and Salmi, 2011). University rankings and measures of international excellence for their part tend to reward research performance (defined in terms of highly ranked journal publications and research funding), the reputation of an institution and the extent to which a university is internationalised. They tend to neglect strengths in teaching and learning and downplay local engagement and contributions to national development (Zezeza, 2012), while the level of investment needed to achieve world class status will, by common definitions, be beyond the reach of many African institutions.

One response has been to push for the establishment of regional centres of excellence, so that there are at the very least some institutions able to attract recognition at this level. But again the measures by which this excellence is measured are still problematic and reflect the agendas and criteria of a Northern system (Leach and Waldman, 2009). Excellence comes to be more about external competitiveness and rankings, rather than about internal quality

and coherence. Given the persistent dominance of these rankings by Northern universities, the danger is that African institutions devote considerable efforts to compete in a system where the odds are already stacked against them, and in the process ignore national HE and development needs. This can also result in African universities failing to define their own missions and objectives.

Internationalisation in an African context

The idea of ‘internationalisation’ has become a major concern for universities across the world, and Africa is no exception. Indeed the earliest (colonial-era) institutions were internationally linked from their very foundation, either as colleges of parent universities or replicating the institutional models of the colonial power. Today African universities are both enmeshed in the internationalisation agendas of their partners, and seeking to articulate international strategies of their own. International collaboration is seen to be a critical ingredient for any successful research system (The Royal Society, 2011) while the international dimensions of teaching and of student and staff mobility are often stressed (Knight and Teferra, 2008). Internationalisation can nevertheless mean quite different things in different places. A report prepared at the outset of the Irish-Africa Partnership reveals that African and Irish institutions had quite different ideas of what the partnership should aim to do, and of its eventual benefits, although there were still common concerns (Nakabugo et al., 2010). Partnerships with African HE are commonly framed by Northern universities’ internationalisation strategies, as a recent Canadian report emphasises (AUCC, 2010). These may either provide an impetus for the establishment of new partnerships, or existing initiatives may find themselves formally endorsed and able to access new levels of support as a result of this strategic attention.

For African universities seeking to develop greater international connections, Europe and North America are no longer the only prospects for partnership. There is a growing trend towards South-South partnership, with India and China both making substantial commitments to the continent. For example, the Indian Institute of Technology in Bombay is involved with the African Institute of Science and Technology in Abuja, Nigeria, while India is also sponsoring institutes in educational planning, IT and vocational training. A Chinese sponsored Forum on Africa-China Cooperation held in 2009

projected that China would offer 5,500 scholarships to African students by 2012.

A number of recent initiatives have drawn attention to partnerships with African universities within the framework of internationalisation (EUA, 2010; AUCC, 2010). The European University Association's White Paper is framed by the desire to move beyond individual or institutional links, and to begin a more strategic conversation at a regional level around the policy and mechanisms by which European and African institutions might cooperate in the future (EUA, 2010). Yet according to an International Association of Universities (IAU) survey, relatively few countries actually prioritise partnerships with African universities in their internationalisation strategies (IAU, 2010). Where it does feature, it is perhaps commonly associated with philanthropy or development - not as a way in which Northern universities elsewhere can advance their own 'excellence'. Internationalisation is, then, far from a neutral concept, bringing with it risk as well as opportunity. The relative disinterest with which Africa is treated in debates on internationalisation led Jowi (2012) and Zeleza (2012) amongst others to rightly argue that African HE must define internationalisation in its own terms, to harness it in support of its own aims, rather than simply being offered a role in the internationalisation strategies of others. Indeed, there have even been suggestions that African universities need to first delink themselves from the international system, in order to internationalise on their own terms (de Wit, 2012).

Although the growing importance of South-South partnerships is explicitly acknowledged by the Association of Universities and Colleges of Canada report and the seminar on which it is based aimed to learn from southern partners, the stated goal of the seminar was to 'share best practices to further advance the internationalisation of the Canadian HE community' (AUCC, 2010: 3). German delegates at the AUCC seminar emphasised that partnerships (if not necessarily with Africa) were important elements in marketing strategies, and in efforts to source the best of academic and student talent.

As Jowi (2012) warns, there is a risk that internationalisation, as the latest agenda by which African HE is to be defined and approached, could

accentuate rather than close gaps in research and knowledge systems. At the level of individual Northern academics and their institutions, engagement with counterparts in Africa is no doubt often driven by a genuine interest in academic partnership and engagement, but the logics of international and national HE funding and reward systems (the primacy of publication in highly ranked journals, and the drivers of individual career progression) are liable to create particular structural distortions. For some, these lead to concerns about a recolonisation of academic practice (Ibid.); at the very least they may lead to the further development of a policy narrative which sees African HE as a variant of an 'international' HE system, encouraging the adoption of funding and organisational models that mimic those of Europe, North America and elsewhere, rather than as something distinctive in its own right.

A number of suggestions of what a distinctively African internationalisation agenda might look like are nevertheless emerging (Kotecha, 2012), while an African Network for the Internationalisation of Education (AINE) was established in 2008 (Knight and Teferra, 2008). The regional integration of African HE is particularly emphasised within such discussions in order to encourage the circulation of academics and students within the continent, to develop HE systems which better reflect the realities of their own countries and regions, and to ultimately develop a stronger continental foundation for subsequent engagement beyond Africa (Ibid.; IAU, 2010; Jowi, 2012).

An East African HE area has been proposed, while the African Union has established the Mwalimu Nyerere Scholarship Scheme for mobility. It is perhaps notable that many of the concerns for African internationalisation reported at an AINE conference in 2011 echoed those frequently identified for African HE more broadly; internationalisation is a means by which Africa seeks to build its research base, develop future generations of academics, strengthen the role of information and communication technologies, and tackle the brain drain, rather than a detached and separate agenda (Jowi, 2011).

Conclusions: the possibilities and dilemmas of partnership for strengthening research

African HE is growing, its universities are getting stronger, its published outputs are increasing, research is becoming more visible, and the sector is ever more involved internationally. Universities nevertheless continue to face considerable challenges, both in their internal composition, and in their ability to interact productively and confidently within international academic networks. Partnerships will undoubtedly continue to play an important role in enabling African academics and their universities to rebuild and re-energise their research departments, through technical and intellectual support. However, they also bring with them normative ideas that in themselves pose new challenges. International links naturally invite comparison with foreign institutions; but as their international engagement grows, so African universities become increasingly enmeshed in debates and agendas – and in the systems of academic production arising from these – determined by and for Northern HE systems, substantially better resourced and responding to different social, economic and political demands and ideas.

Despite a growing body of scholarship, and an even greater level of anecdotal reflection captured in meetings and workshops, issues of research capacity, quality, publishing, PhD training and post-PhD careers are often discussed as a set of relatively discrete, technical concerns, for which the solutions are often primarily financial. While new funding is essential, the human dimensions – the relational, cultural, and political dimensions of capacity building and of daily life within African or partner institutions – often receive much less attention. Much of what we ‘know’ comes from assembled anecdote and patchy data, compiled at national level, or from a few institutions. A challenge to capacity in African HE is therefore to grow the level of research on the sector itself, and particularly from within the continent. Flawed analysis of the problem leads to a flawed response. The continent’s tertiary institutions are many, varied and diverse, and many have displayed extraordinary resilience over the years. It is clear that as a community we need to move rapidly beyond generalised assessments and be more receptive to what African institutions are doing, if we are to understand and respond coherently and usefully to these

needs; needs which must be identified and articulated by African academics and university leaders themselves.

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Perspectives

FUTURES ORIENTED DEVELOPMENT RESEARCH: AN IRISH-AFRICAN PARTNERSHIP-BASED FORESIGHT EXERCISE

Ronaldo Munck et al.

Introduction

Development theories, from modernisation through to dependency approaches, have usually posited a *telos* (from the Greek *έλος* for ‘end’, ‘purpose’, or ‘goal’) but this has, more or less, been taken as a pre-given and not an open-ended process open to human agency. Most development theories are teleological in the sense that they have an implicit destination in mind. Modernisation theory is perhaps most explicit in seeing a desired future being achieved if certain policies are followed. Radical development theories are also often teleological in the sense that negative future outcomes are often built into its theoretical framework. More recent post-structuralist approaches to development consciously eschew a teleological bias and build in an element of undecidability. What neither the teleological nor the non-teleological development theories actually develop is a future-orientation based on actual trends and an acceptance of the radical undecidability of the future. We argue here for a Foresight/futures approach to development research based on an understanding of the dynamic web of change within which development research takes place. In the era of globalisation we need to recognise firstly the complexity of global development but also that the future is more open-ended than was the belief of earlier development theories. This futures approach also allows us to foreground human agency and its role shaping the future. The future is not pre-given but ours to construct.

It is of course, a truism to say that the future cannot be known. But we can seek to better understand what will influence our possible futures and create a framework which will be both robust and flexible to work forward on. Commercial organisations have for some time been developing tools to ‘future proof’ their strategies and become more competitive. The Shell Foresight

exercise in the 1970s which sought to future proof the company against rising oil prices is a prominent case but it is now mainstreamed in many corporations. National development strategies have also liked Foresight and in particular 'technology Foresight' approaches. In the higher education system Foresight is quite new but a recent Irish higher education Foresight exercise at Dublin City University shows that it is gathering strength (Reference?). We still need to make the case that Foresight approaches and techniques might be relevant for development research.

In sub-Saharan Africa the most influential Foresight exercise is still the paradigmatic Mont Fleur Scenarios: 'What will South Africa be like in the year 2002?' (Kahane, 1999). It brought together regime, business, civil societies and opposition thinkers in a safe non-mandated setting to envisage potential post-apartheid scenarios for the country. While the participants were clearly not going to agree politically, they were able to agree on the terms of the debate and how South Africa 'worked' as it were. While both the regime and opposition maximum programmes were deemed unviable in the long term, a feasible and desirable outcome did emerge. The organisers of Mont Fleur conclude that for a scenario effort to be successful the process must be credible (in terms of neutral leaders) informal and reflective (rather than prescriptive) and inclusive (to include dissenters) (Kahane, 1999: 3).

Through Foresight and its associated tools such as scenario planning and horizon scanning, we can visualise alternative futures. We examine the background to Foresight studies in sub-Saharan Africa and then some recent attempts to generate 'Foresight for development' or what Bezold et al. (2009) called 'Foresight for Smart Globalisation'. That sets the scene for an account of the Foresight Exercise (see IAP Foresight) carried out by the Irish African Partnership for Research Capacity Building (IAP) which brings together the nine universities on the island of Ireland and four universities in Africa (Eduardo Mondlane, Mozambique; Makerere, Uganda; Dar es Salaam, Tanzania; and the University of Malawi). From the general and particular accounts carried out we draw some general conclusions on the possible benefits of a future orientated development research programme and also some of the challenges it would face.

What is Foresight for Development?

Futures thinking, in its various guises, could help us develop research strategies relevant for the future. Foresight embraces a wide range of participative tools and techniques designed to help organisations ‘future-proof’ themselves and to take advantage of emerging opportunities. It is not designed to be a prediction of the future nor is it an end in itself. Rather, it is designed as a framework to reduce uncertainty and risks, while increasing strategic insights and improving decision-making processes. This type of strategic thinking helps us maintain and develop a high quality and coherent forward view. The global development process – and research around it – takes place within a complex web of systemic change which we need to take into account. Though Foresight planning has been primarily used in relation to technology it has increasingly been deployed in a broader regional planning and social development context.

Futures research encompasses a number of tools and technologies that have been developed over the last few decades. Environmental scanning is widely seen as an effective data-input method (Slaughter, 2002). Much of the raw material which went into the Irish African Partnership Foresight exercise would have been gathered in this way. Moving on then to the actual analysis we have a scenario building approach which is designed to envisage future worlds which are internally consistent and externally verifiable. It really is the cornerstone of Foresight future work based on scenario logics that allow us to construct divergent future states and then consider a variety of organisational responses. These scenarios need not be likely, only plausible and consistent. The next phase is to design a path into the future which maximises risk. In a word Foresight is aiming at ‘future – proofing’ the organisation.

The Irish African Partnership exercise adapted the scenario building method after the first two workshops. It was simply too difficult to maintain the momentum needed to comply with this method. The decision was to make the exercise more practical and attuned to the needs and experience of the health and education researchers. As it transpired we had found our own way to what the futures literature calls ‘futurescan’ deemed a middle-level exploring method. A long list of trends affecting the future is developed but these are then boiled down to a ‘top ten’. Full scenarios are not needed, only a fairly basic ‘picture’ of the future, which are tested for relevance and effectiveness. According to

Slaughter ‘it is a very effective way of providing a new team with some of the tools for this kind of work’ (Slaughter, 2002). Certainly as applied by the IAP this ‘Foresight-lite’ did help make the research teams gel around a common understanding of future options and research priorities therein.

While Foresight is often seen as a Northern paradigm, having been developed by much as part and parcel of the technology revolution of the 1960’s (see Loveridge, 2009) it has also been deployed in a Southern context. South Africa in particular is found in the top-tier of countries where Foresight units contribute to their national policy development process. A range of non-governmental organisations there also use Foresight to develop strategy around peace and security and resource management in particular. There was also a Foresight study produced for East Africa (Society for International Development, 2008) which brought together a broad range of policy actors in a process of reflection on alternative futures for the region. We could not say that Foresight is as yet embedded in development (and development research) but it is probably more widely known than one would gather from the development literature.

An interesting recent project is The Rockefeller Foundation funded study *Foresight for Smart Globalization* (Bezold et al., 2009). The project is argued to be unique in bringing a pro-poor perspective to bear on Foresight and vice-versa. It argues that ‘Foresight can provide an important set of silo-busting tools to provide a systematic view of the increased complexity of our globalised world’ (Ibid., 2009: 7). As with the approach promoted by Paul Collier (2010) it is, we would argue, based on an unduly optimistic view of ‘smart globalisation’ such as the argument that ‘eighty percent of the world’s population lives in countries where poverty is declining’ (Bezold et al., 2009: 9). There is little consideration of the contrary view that globalisation has actually increased the levels of inequality within and between nations (see Munck, 2006). The point is that Foresight is a method that can be deployed by quite diverse development approaches and for quite diverse political purposes.

While it is interesting to see a preliminary engagement between Foresight and development practitioners, there are possible limitations to this model. As a review of Paul Collier’s development best-sellers, puts it in a

different context, we are dealing with a ‘rousing combination of do-gooding and can-do’ (Lawrence, 2010). There is no explicit theory of development underpinning the work but an implicit faith in the now widely discredited neo-liberal one true faith. While proclaiming its pro-poor approach, in practice it relies on an enlightened private sector and the main problem is deemed to be poor leadership in the South. The project does not offer a social or political analysis of development in the era of post-mobilised globalisation. It simply calls for ‘a durable and vigorous community of forward-looking doers and thinkers’ to work for an ill-defined ‘smarter world’ (Bezold et al., 2009: 5). We would need to ask whether Foresight in itself is particularly useful without an adequate understanding of development in the era of globalisation.

When future studies were first being mooted as a possible approach to development in an African context there was considerable emphasis on how it might be misused to ‘colonise the future’ as post-colonial futurist Zia Sardar put it (Sardar, 1994). There was flurry of activity in the mid 1990s at least in part inspired by the Mont Fleur process (see Blackman and Adesida, 1994). Many future studies were seen as part of the doomsday scenario trend common in Western agencies and commentators at the time. Olugbenga Adesida argued that: ‘the fatalistic views of Africa’s future could become a self-fulfilling prophecy’ (1994: 885). The colonial gaze was an ever-present danger and for Adesida ‘it is quite difficult today to identify the future of Africa as seen by Africans’ (Ibid.). Since then there has been much more Foresight activity in an African context not least the country studies carried out under the auspices of the United Nations Development Programme’s (UNDP’s) Africa Futures project. This is not the place to carry out a review of this work but we need to emphasise the need to be aware of the Western image that Foresight has to some extent in Africa as elsewhere in the global South.

The Irish African Partnership (IAP) Foresight Exercise

The IAP brings together the nine universities on the island of Ireland with four universities in Africa in a partnership aimed at building research capacity for poverty reduction. The work of the IAP is based around 5 x five-day workshops – three in Africa and two in Ireland. Other key activities are a Foresight exercise to identify the main health and education priorities in Africa over the next 10 years around which specific partnerships could be developed and the

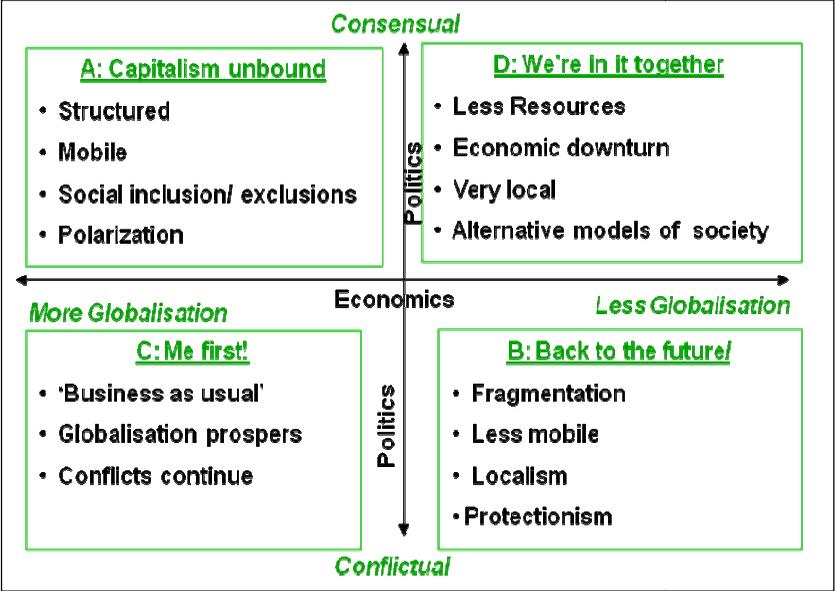
development of a set of quantitative and qualitative metrics to measure and develop research capacity in the partner institutions.

Foresight, in the IAP project, has been implemented mainly through scenario development, but also drawing on a wide range of resources including regular and ongoing trend analysis and horizon scanning work. Scenario development is an important strategic tool, and a practical and applied process. Future scenarios must build on what is changing today, be relevant to the topic at hand, but reflect very different views of the future. There are four main 'components' to the building blocks:

- The critical uncertainties – those areas of change which are most significant in terms of how they will affect the future of research and whose development could go in different directions – i.e. are uncertain. The polarities of two axes based on these changes are used to create a matrix of different futures. These emerge from the long list of trends and changes.
- Givens/areas of change – are those aspects of change and issues that are relevant to the topic at hand – i.e. capacity building but do not define its development to the same extent. These areas of change are then set within the framework characterised by the critical uncertainties, and are likely to develop in different ways under different circumstances, i.e. in different scenarios.
- Actors/key players – are those organisations and individuals whose decisions and actions are likely to affect development research and which are likely to be different in different circumstances – i.e. in the different scenarios.
- Factors – are those areas and aspects of the issues over which the organisations in question, i.e. the 13 universities involved in the IAP – have some influence and control.

The future is of course uncertain and unpredictable but we can project existing trends and make educated forecasts of the main parameters of change. In other words we need to see what the main influences on the development process are. At the second IAP workshop in Makerere, we came up with the following matrix (Figure 1) trying precisely to do this.

Figure 1: Makerere Matrix



What we see here is a horizontal axis we called Economics which could move towards greater internationalisation or globalisation, or it could move in the opposite direction and the world could become more closed and inward looking. Current debates on how to deal with the global recession are precisely around those issues and they talk about the dangers of protectionism if the powerful economies begin to 'look after themselves' more.

The vertical axis we called Politics and it was counterposing a more open/democratic politics at one end of the spectrum and a more closed/undemocratic polity at the other end. Clearly then we could have

different development scenarios depending on which type of politics prevailed. What was interesting was when we combined the economic and the political axis and had a very engaged discussion of the type of worlds emerging. We started off trying to discern two worlds only but the workshop decided to fill in the four possible worlds in the 2 x 2 matrix. We gave these names to make them easily identifiable and some basic characteristics.

The key driving forces for the Foresight matrix were seen as the global political economy on the one hand and the national social and political order on the other hand. At the level of the global political economy the process of globalisation may continue to promote integration of the developing world or conditions may become more protectionist following an economic crisis. Globalisation would be stalled, as it is more or less at the current moment, and the big power blocks could turn towards securing their own futures to the detriment of the majority world. From an African perspective neither option was seen as terribly appealing and third options such as much more engagement with China which promises a different development model might come to the fore. Be that as it may, for now we simply take the global political economy as the main horizontal axis with an 'open' and a 'closed' tension at either end.

The vertical axis is focused around the national political level. In other words at a national level in Africa countries may achieve greater social cohesion and political stability or they may suffer from social dislocation and political conflict. This is related to the global political economy which may create more or less favourable conditions for development. But there is also a national (and regional) level of politics which is relatively autonomous from global politics and which has its own dynamic. Different countries may respond in different ways to the same global circumstances.

At the next workshop we worked on combining the global political economy horizontal axis with the national social and political cohesion/consensus vertical axis giving us four possible scenarios as outlined in the Foresight matrix below (Figure 2):

Figure 2: Foresight Matrix

- World A we called ‘Capitalism Unbound’ because it was one in which globalisation takes off and accelerates and at the same time national politics remain fairly stable. It is a highly structured and regulated world which creates great dynamic growth but also more inequalities.
- World B was given the title ‘Back to the Future’ because the world has turned protectionist and political cohesion is at a very low level. There is less mobility of people, capital and ideas. Inevitably communities are torn apart as political vision is in short supply.

At first we focused on these two worlds as polar opposites in a way. But the participants at the Makerere workshop decided to make the grid complete and thus we built up the four scenarios in the 2 x 2 grid.

- World C we called ‘Me First’ insofar as globalisation has once again taken off but in the context of few rules, a sort of survival of the fittest. The level of political consensus and social cohesion is low. Multilateralism is a thing of the past and regulation never took off.
- World D became known as ‘We’re in it Together’ because while globalisation and internationalisation are still sluggish there is, at least in Africa, a return to some kind of greater political vision. Communities are knitted together by adversity and while austerity is a fact of life it is implemented fairly.

The two most opposed worlds are A (Capitalism Unbound) and B (Back to the Future) which set up a strong tension for our thinking about future education and health needs. In the more globalised yet more consensual World A we would expect more private provision of health and education services as internationalisation deepens. There are likely to be two quite distinct health and education systems for the ‘haves’ and ‘have nots’. In World B, which is both less globalised and less cohesive, we would expect a greater importance for local provision of health and education services and a general ‘return to basics’. Interestingly we can expect our chosen health and education priorities such as

maternal/child health and teacher education to be important in both worlds even if for different reasons. Likewise our cross cutting themes such as gender equality and ICT and climate change will be hugely relevant in both scenarios.

Potential Scenarios

Scenario A: Capitalism unbound (Globalisation High/National Cohesion High)

The global economy is thriving and *new global rules are adhered to*. The 2008-09 economic downturn has been overcome and a new era of growth based on renewable energy is having a considerable impact. Conflict in the Middle East has been resolved by the Obama administration. The combination of the global economic and financial crisis which brought a change of emphasis and more multilateral approach plus the shared threat of climate change which was seen as an opportunity for recovery from the recession provided a much needed impetus for change and renewal. In Africa, a *more consensual approach to politics* has emerged for a number of reasons: minority governments in some places make it a necessity; a genuine desire to try to move away from confrontation and conflict to inclusion and consensus; a recognition of the scale of the problems faced and the need to work for the benefit of all; an emerging 'African' identity and sense of self creating a wider context. However, sadly, the reality on the ground often falls long short of the hopes at the strategic levels. The results are often weakened decision making; lengthy discussions and deliberations for even quite minor decisions resulting in bureaucratic procedures; and a less effective counter-balance to the fast moving force that is the global market and the multinational companies. Companies tend to rule, because they get things done.

Scenario B: Back to the future (Less Globalisation/National Social Cohesion and Political Consensus Low)

The *conflict between the haves and have nots* has greatly increased at the global level as the United States (US) and European Union (EU) take up a fiercely protectionist stance. The economic depression at the global level continues to exert an influence. There is far less mobility in terms of people, investment and ideas. The return to localism, once seen as an antidote to excessive globalisation, is now an enforced reality. This is an inward looking, less mobile

world where globalisation has gone into retreat and protectionism and nationalism are rising to take its place. At the international, as well as a more local level, tolerance and cooperation are declining. Pressures on the environment and on communities are increasing. The world is shutting down.

Scenario C: Me first! (More Globalisation/Low levels of political consensus and social cohesion)

While the economic depression of 2008-09 has been successfully overcome through energetic interventions by the World Bank and IMF, *political consensus has been irredeemably damaged*. Multilateralism now prevails: after the decline in prices for raw material during the recession, the return to growth brought a return of high prices and a continued land grab. While Africa is the focus of a great deal of development, improved agricultural production and the like, much of it is foreign owned and funded with the benefits going back to the country or company of origin. However, the benefit is infrastructure development and investment to create more security of supply for foreign investors primarily. High resource and energy prices have also led to increased investment in clean technologies, with solar farms now widespread for both local production needs but also to export. As globalisation regains its stride so does its effect of creating *great wealth and great inequality at the same time*. The rich ignore social fragmentation and the state is so weakened by globalisation it is powerless to contain it.

Scenario D: We're in it together (Less Globalisation/More political consensus and social cohesion)

The global recession stretched out to 2015 and effected a total transformation of the advanced industrial societies. There was a dramatic decrease in the availability of resources and inevitably *local responses to austerity emerged*. The globalist/Africanist conflict of the early 2000s has been replaced by a new regionalism. Traditional social and cultural norms come to the fore giving peace and security at least a chance. The economic austerity imposed by global economic conditions gives rise to alternative models of society which come to power in a number of countries. The state is re-energised and seeks to encourage sustainable development once again. The recognition in the wake of the long economic downturn is that we are all 'in it together'; with both economic and environmental issues getting joint and collaborative attention.

Developing the above scenarios was useful in its own right to frame our discussion of emerging health and education priorities but also as a way of building a common understanding of unfolding futures across the partnership. Building these scenarios allowed us to creatively imagine alternative visions of the future. We can now use these scenarios to boost our research capacity building strategy against these potential developments. Scenarios are designed to identify problems and discontinuity for our strategy going into the future. They are designed to provide a context for ongoing debate, for example around emerging areas of critical importance in development research on health and education issues. These scenarios are plausible stories of how the future will unfold and clearly and directly affect our research capacity building strategies and our priorities as higher education institutions.

Towards a Research Priorities Matrix

During the project’s stakeholder consultation, which took place between Workshops 1 and 2, a range of emerging health and education research priorities was identified. These were summarised (Table 1 below) as part of the presentations by the project team at Workshop 2.

Table 1: Research Priorities in Health and Education

Health	Education
Food Security/Food Studies/Nutrition	Inclusive Education and Gender
Climate Change/Environment	Education for Community Development
Public Health	ICT and Education
Water	HIV/AIDS Education
Biodiversity/Biosafety/Conservation	Initial Teacher Education (ITE) and Continuing Professional Development (CPD)
HIV/AIDS	Curriculum Development and Reform

Infectious Medicine	Diversity in Education
Malaria	Education in Disadvantaged Communities
Maternal Health	Improving Education Delivery (Adult & Child Literacy, Science & Maths, Special Needs Education)
Gender and Health	Education for Sustainable Development/Life Skills Education

These research priorities were revisited in the second workshop as part of the scenario discussions to examine which would be priorities within the different futures. Two groups each focused on one topic – two on health and two on education with issues, options and priorities relating to ICT and gender integral to those discussions.

Table 2 below sets out the priorities within each scenario. Participants not only prioritised specific areas, but also considered how those priorities might change within the different futures. The research priorities identified in each of the scenarios showed considerable overlap and consistency, although the wider context of food and climate change was only seen as a potential priority in Scenario A.

Table 2: Opportunities and priorities in each scenario

Priorities in Health and Education			
HEALTH		EDUCATION	
Scenario A: Capitalism unbound	Scenario B: Back to the future	Scenario A: Capitalism unbound	Scenario B: Back to the future
Infectious diseases - HIV/	HIV	Initial teacher education -	Curriculum Development

AIDS		Continuous Professional Development	and Reform
Maternal health	Gender and health	ICT in education	Diversity in education
Food security	Maternal health	Education for sustainable development	Education in disadvantaged communities
Climate change	Infectious medicines/diseases	Education in disadvantaged communities	Improving education delivery

Key Points Arising

HIV and Infectious diseases were top priority in both scenarios. Vaccines were not seen as having arrived yet for HIV but prevention may be improving. Public health responses e.g. in the form of access to condoms, was likely to be significantly reduced in Scenario B.

Other infectious diseases and malaria were also top priorities. Drug resistance was seen as a growing issue and epidemics could be on the increase. Work on vaccines was less likely in Scenario B, but in the absence of such development alternative local approaches to prevention such as draining of swamps would increase as a lower cost and local solution.

Women and health was a significant priority – maternal health might well improve, especially in Scenario A, with fewer deaths at birth and also fewer unwanted pregnancies. In Scenario B, women’s health in general and maternal health in particular could be more precarious and less of a priority because of the danger of increased conflict.

Food security and climate change were both priorities in Scenario A because of the wider impacts and knock on effects on health. Increased food production as a result of more widespread use of GM and more commercialised

rather than subsistence farming could both result in reduced malnutrition and overall improvement in basic health. While not mentioned in Scenario B discussions, the potential impacts from climate change and the effect on health and nutrition are likely to make it a priority.

Teacher development and Continuing Professional Development – these were the mainstay, without them other priorities were impossible to achieve.

Developing and implementing ICT in education was a priority in both. Its potential to bring education and learning to remote rural areas, to enhance women’s access to education, reduce exclusion among disadvantaged communities and those with special needs was part of the longer term development. Blended learning and lifelong learning were also seen as enabled by greater use of ICT.

Education for sustainable development was a key priority in Scenario A and curriculum reform in Scenario B. Both had a local focus but in B change and development were vulnerable.

Validating our Health and Education Priorities

Having elicited health and education research priorities from workshop participants, the next stage in the Foresight process was to compare and contrast these priorities with those identified by broader analysts and actors. To achieve this, in the period between the second and third workshop further research was carried out. This involved mapping existing literature and research (at international and regional levels as well as relevant national plans and strategies) and conducting elite interviews with a range of health and education specialists, both internationally and nationally within the four IAP partner countries. A number of further possible research priorities emerged from this work.

The expanded priorities (twenty for health and twenty for education), were scored firstly by individuals and secondly by group consensus at the third workshop in Maputo. Results from this exercise indicated that a number of topics scored highly across the groups. In health; the highly scored priorities were infectious diseases; maternal health; HIV/AIDS; food security and gender

and health. The importance of engendering research projects was repeated throughout the four day workshop and the health group felt strongly that any project proposals should be gender sensitive. It was also deemed critical that the impact of climate change be considered. Additionally, taking a health systems approach to research and advocating for equity in health were thought of as crucial in emerging research proposals. It was therefore agreed that gender, climate change and health systems/equity were to be treated as cross cutting themes within the three thematic areas.

In education, consistent with priorities that emerged from the Foresight research scenarios in Workshop 2 in Makerere, and with future research needs, Teacher Education and Education for Sustainable Development, with ICT and Gender as cross-cutting themes ranked highly. The focus on Teacher Education was not surprising as the quality of the teaching force is a major driver for the global education agenda. The recent *Education for All Global Monitoring Report* (UNESCO, 2007) underscores the need for more teachers globally if the goal of Education for All is to be fully attained by 2015.

How the Selected Health and Education Thematic Areas Relate to Scenarios A and B

Scenario A entitled ‘capitalism unbound’ is characterised by accelerated globalisation, stable politics and dynamic growth. This situation is very dependent on political leadership. If accompanied by a prosperous economic situation, it may be easier to retain health workers and researchers. A higher level of resources and an increased health workforce would produce a positive effect on maternal and child health and the ability of the country to deal with infectious disease. In an alternative situation in which greater inequalities exist, the poor may become marginalised with mass migration from rural to urban areas. This would place great pressure on resources and bring problems of access to clean water, sewage and waste disposal. Increased poverty would also lead to an increase in infectious disease such as diarrhoea and a subsequent decline in maternal and child health. It is possible that agriculture may become commercialised and mechanised to increase land productivity and food production. This might lead to urbanisation or alternatively, it might result in increased food for local people. However, if the latter situation prevails, the

burden imposed by malnutrition may increase as a result of processed and westernised food.

Research in education, particularly teacher education, plays a major role in Scenario A. With the increased mobility and brain drain, there is need to beef up teacher training and pedagogical research in order to increase both the quantity and quality of teacher. To achieve this, alternative approaches to research and teacher education such as the use of ICT would need to be embraced. ICT in education would also be useful for its potential to bring education and learning to remote rural areas, enhance women's access to education, and reduce exclusion among disadvantaged communities and those with special needs. In addition, the free-liberalised market economy and the internal and external pressure on natural resources, calls for the need for education for sustainable development to mitigate the resultant impact of climate change. Teacher Education research and curriculum would also need to be reformed so as to integrate the principles, values and practices of sustainable development.

Scenario B entitled 'back to the future' is characterised by a protectionist environment, economic depression and decreased mobility. Decreased mobility (localism) might help to reduce brain drain and attrition of workers from the health system, thus creating a more favourable situation in terms of maternal and child health and infectious disease. Transmission of disease between countries would also decrease with decreasing mobility. Similar to Scenario A, a potential consequence of Scenario B is political conflict. This would lead to an increase in infectious disease and a decline in maternal and child health especially if the population is displaced. A potential result of a protectionist environment is a high demand for food and energy supplies leading to both land grab and environmental degradation. Food security will be a major threat in this situation.

Due to the deepening economic depression within Scenario B, Education for All is at threat, because it has become unaffordable for the poor. Because of decreased mobility, there is massive pressure and dependence on the meagre natural resources, resulting in environmental degradation and climate change. As is the case in Scenario A, Teacher Education and education for

sustainable development would play a major role in redressing the society. The two education strands would be crucial to explore the conditions and factors that would impact on changes in behaviour that will create a more sustainable future in terms of environmental sustainability, economic viability and a just society for present and future generations.

It is worth noting that the scoring and ranking to prioritise the long list of possible research areas was based on the following five criteria which were developed at the Maputo workshop in quite heated discussions:

1. Contribution to poverty reduction

- To what extent does the problem contribute to poverty?
- How severe is the problem?
- To what extent will the research contribute to poverty reduction?

2. Contribution to community empowerment

- To what extent does the problem reflect measurable community priorities?
- To what extent will the community be actively involved in the research process?
- To what extent does the project enhance community capabilities?

3. Relevance to policy and practice

- Has research from this area been translated in policy?

- Will the project have the support of local/national authorities/policy-makers?
- Is it likely that the results of the study will be implemented?

4. Contribution to the empowerment of women

- Does the problem place a particular burden on women?
- Is research in this area likely to contribute to empowering women?
- Will the project meet basic engendering of development criteria?

5. Criticality/feasibility

- How urgently are results needed for developing interventions?
- Is further research needed?
- Are there sources of funding available for this project?

These criteria were the subject of intense discussion with some, for example the one on community empowerment, dividing the more traditional researchers from those more imbued with a development ethic. Interestingly the debate was not polarised by the national make up of groups but rather according to the different interpretations of the politics of development. How to deploy this grid sensitively and with due cognisance of political criteria was also carefully discussed. The point about this grid is that it is qualitative and thus allows for a politically grounded tempering of the Foresight process. If we were conducting the exercise on behalf of a national health ministry our calculations and priorities would no doubt be different and here the priority setting methodologies of Commission on Health Research for Development (see COHRED, 2010) would be a more appropriate management tool.

Matters Arising

Drawing a balance sheet on the Irish African Partnership Foresight Exercise is not easy as opinions within the partnership were quite divided. A survey conducted as part of the usual project evaluation concluded that 70 percent of participants found it to be 'effective' or 'very effective' in terms of setting a research agenda, 15 percent considered it was 'ineffective' and another 15 percent were uncertain. We may start by acknowledging that quite a few of the more experienced development researchers (especially on the Irish side) were quite resistant to the approach, bordering on hostility at times. It would be our reading that the rather lengthy and seemingly abstract nature of the Foresight Exercise (especially in the early phases) clashed with the often 'can do' pragmatic approach of many development researchers. Be that as it may, Foresight is far from being an obvious approach to many development researchers. However we can argue that the exercise was worthwhile for the participants and not only based on the satisfaction survey cited above.

Capacity building or capacity development can, for the sake of convenience, be separated into its individual, organisational and inter-institutional or systemic components. The Foresight exercise we engaged in undoubtedly contributed to individual capacity building. Inter-disciplinary and inter-national dialogue was strengthened. A common understanding of development and development research only emerged as a result of the (sometimes uncomfortable) Foresight process. Of course, most usually development researchers are 'on the same page' but in large transnational and trans-disciplinary teams this might not be the case. While organisational capacity building was something which would occur (or not) in the individual institutions, the inter-institutional capacity building was enhanced by the Foresight process. The degree of trust and common purpose was greatly enhanced as testified by a number of partnership initiatives taken after completion of the Foresight exercise.

We would argue that the Foresight approach and methodology can make a useful contribution to development research. If it is genuinely partnership based it can go some way to developing participation in rolling out a pro-active research agenda. Trans-disciplinary development research lends itself perfectly to the Foresight approach with its open problem-solving

orientation. Foresight can encourage dialogue across disciplines but also helps bridge the researcher/practitioner/policy makers divide by providing a 'safe place' for thinking on a long-term horizon. The participatory nature of the Foresight approach is also highly valued by participants and, indeed, this feature could be extended to other communities of interest.

It would be important to recognise that a futures orientation for development research is not a panacea for development. It is only a tool and we would have to be sceptical about its ability to overcome structural forms of inequality in and of itself. It is not a technical fix. Indeed, it is possible for the Foresight methodology to create a false impression of accuracy and 'scientificity'. Its value is rather, in our view, in creating a shared mindset focused in creative solutions to development problems and in forging a more collectivist or partnership-based approach. There is also a potential pitfall in that it can become a 'top-down' approach with mainly the experts empowered to talk. Foresight can only too easily become another in a long list of Northern 'solutions' to development issues based on superior knowledge.

Foresight is simply a method and can be deployed for very different purposes. Why Shell Ltd. might wish to use it is different from why the ANC and PAC agreed to engage in the Mont Fleur scenario building; it is not about predicting the future but about enabling preferred futures. While the future is not predictable it is also not predetermined and is influenced by our choices. Unlike weather forecasting, strategic Foresight is dealing with social systems in the broad sense. While complex these systems are not unknowable. Foresight can help us reduce the unknowable and increase order and clarity. Above all, we would conclude on the basis of our own limited experience, that Foresight can, through the free-thinking interactions it promotes, create new knowledge and a better understanding of what previously might have been out of sight and out of mind. If Foresight can promote creativity in development research it should be given a chance.

From our own experience with the IAP and the growing interest in 'Foresight for Development' we would draw some general conclusions. A futures orientation to development research planning can be a valuable tool if undertaken in a partnership modality. Foresight and its associated methodology

can be a valuable development tool but we must guard against ‘scientificity’ and ‘top down’ approaches. Given the complexity of global development challenges any research programme needs to acknowledge that there is no ‘quick fix’. The challenge of creating a ‘pro-poor’ development strategy will not be met by Foresight alone. The approach may, however, empower Southern-driven research agendas and help harness global development resources and agency within academic and other research bodies.

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THE SOUTHERN PERSPECTIVE OF THE NORTH-SOUTH EDUCATIONAL PARTNERSHIP IN IMPROVING THE QUALITY OF TEACHER EDUCATION: THE CASE OF LESOTHO COLLEGE OF EDUCATION

John N. Oliphant

Introduction

Over the years, we have known global North-South dealings to have been based largely on traditional donor-recipient relationships. Foreign aid, uni-directional from the North to the South, was central to these relationships and showed how partnerships in academia 'have been and continue to be rooted in the assumptions, understandings and practices of foreign aid and must be understood in those terms as well' (Samoff and Carrol, 2004: 71). The history of these relationships has been well documented. Gaillard (1994), for example, showed how changes have evolved from technical assistance, overseas training, institution building, institutional twinning arrangements and collaborative research partnerships.

As far back as the 1980s, the Independent Commission on International Development Issues chaired by Willy Brandt produced a groundbreaking report which influenced the relations between the so-called developed North and the under-developed South. Since then there has been a perceived need for a new international economic order and international relations in which the privileged and rich North and the disadvantaged and poor South would benefit in a sustainable way (cf. Sifuna, 2000). Since the publication of this report, there have been better understandings of the complex realities of the North-South relationships that had been conditioned, among other factors, by the postcolonial experience of the South, and perhaps those of the North as some may argue.

This paper will focus on the current trends in North-South relationships where development assistance is built around partnerships. In particular, it will focus on partnerships in the context of educational improvement and provision in higher education. The author shares the

experiences of Lesotho College of Education's participation in a partnership involving thirteen Irish third level institutions and one Ugandan teacher education institution under the aegis of the Centre for Global Development Through Education (CGDE) based in Mary Immaculate College in Limerick, Ireland. In the process of sharing these personal experiences the author takes a critical stance, providing both the positive lessons as well as pointing out areas in which improvement would be needed in this partnership, and hopefully in other North-South educational partnerships. The author draws most of the information for this paper from direct personal involvement in CGDE and its activities. He draws further information from some interviews with Lesotho participants in the CGDE activities. CGDE documents and the literature on partnerships were also useful sources of information

The paper is divided into six sections. The first section introduces the concept of partnerships and the second provides the national and institutional context of Lesotho College of Education. The third section briefly outlines the key features of CGDE, its background and the partnership itself. The fourth section is a brief review of existing relevant literature on North-South educational partnerships. The fifth section provides a critical discussion of this CGDE-led partnership from the author's Southern perspective. Finally, the sixth section looks into the lessons learnt and, hopefully, areas for consideration in future North-South educational partnerships.

National and Institutional Context of the College

Lesotho is a mountainous and landlocked country in southern Africa, completely surrounded by South Africa with a population of 1.8 million. It was a British colony, politically and economically under the British tutelage although on the socio-cultural side the French (Paris Evangelical Missionaries Society, later the French Catholic Missionaries and the Anglican missionaries) established churches and schools. Therefore most schools have historically belonged to the Catholic, the Evangelical and the Anglican Churches. The churches also owned teacher training colleges until 1974 when the National Teacher Training College (NTTC then) and now Lesotho College of Education was established.

Lesotho College of Education opened its doors in 1975 after the seven church-owned teacher training colleges were abolished. It was then run as a department under the Ministry of Education until 2002 when it became autonomous through an act of parliament to be renamed Lesotho College of Education. Since then the college has had the authority to determine its own programmes and strategic direction and to allocate its resources. It continues to be a public institution, financed by means of a subvention from the government. The Ministry of Education and Training is the main custodian of educational provision and management in Lesotho from the primary schools to the tertiary and higher education level.

The College currently has about 5,000 students and is the only teacher education and training college in Lesotho, particularly catering for pre-service primary teacher training. It offers diplomas and certificates for primary, secondary and early childhood programmes, some through a full-time pre-service mode and the others through a part-time in-service distance learning mode. The majority of its student population (over 50 percent) are in the part-time programmes. Entry into the programmes, except the early childhood programme to which the minimum entry criterion is a junior secondary certificate, is a high school 'O level' qualification. The College also provides continuing professional development for practicing qualified teachers in the areas of pedagogy, special education and technology in education. It also participates in research, consultancy and evaluation work relevant to the education system.

Some of the major objectives of the College as articulated in its 2010-2013 strategy include: programme and curriculum review and development of quality assurance systems; strengthening information and communication technologies for administration and teaching; and improving teaching and teaching practice services in teacher training. One of the key strategies for achieving these objectives is through partnerships with other institutions locally, regionally and globally. The next section examines the notion and practice of partnerships.

Literature on Partnerships

Partnership as a development strategy has come to replace the distant, hands-off and disengaged approach to development in the form of hand-outs and give-and-go development support. In education, the challenges of Education for All (EFA) as articulated in Jomtien in 1990, have necessitated a partnership approach to development according to Draxler (2008). As a result of these education challenges as well as the urgency resulting from the approach of EFA and the Millennium Development Goals (MDGs) – scheduled to be delivered by 2015 – North-South partnerships as a development strategy have become common both in the language and practices of policy makers. These development targets appear to be premised on the idea that such partnerships will not only speed up implementation through the experience and expertise in the North, but will enhance capacities in the South and ensure sustainability beyond the partnerships.

But what exactly do these partnerships involve and represent, particularly in a North-South educational context when the notion ‘North-South’ is itself problematic? Samoff and Carrol (2004) saw the notion of partnerships as an elusive target; a view also shared by Ishengoma (2011: 9). Dell further pointed to the fact that ‘building and maintaining successful partnerships that can work within and challenge the tenacious asymmetries of global power, resources and capabilities often requires sensitive planning and attention to detail’ (2010: 1). But what are these partnerships? And is there anything in how they are defined that could help us understand how they could be made effective in spite of the problematic history of North-South relationships?

The Concept and Practice of Partnerships

Draxler (2008: 31) viewed partnerships as the pooling together and managing of resources, and the mobilisation of competencies and commitments for the purposes of achieving some development goals and agendas. Others see partnerships as collaborative arrangements between actors in two or more spheres of society involved in a non-hierarchical process to achieve some goals (Glasbergen, 2010: 1). In some cases, especially in the academic sphere,

partnerships are used interchangeably with academic links and linkages (Ishengoma, 2011).

The World Economic Forum (2005a) defines a partnership as ‘a voluntary alliance between various *equal* actors from different sectors whereby they agree to work together to reach a common goal or fulfil a specific need that involves *shared* risks, responsibilities, means and competencies’ (author’s emphasis). That said about partnerships in general, Dell argued for a definition of an effective educational partnership as ‘a dynamic collaborative process’ in which there is ‘*mutual though not necessarily symmetrical benefits* to all parties’ (2010: 1). Today, educational and academic partnerships are generally viewed as being among several strategies for effective and working cooperation and collaboration between institutions in the North and South. They appear to be valorised as a *sine qua non* for the development and capacity building of the higher education institutions in the South (Dell, 2010; Ishengoma, 2011). This view is shared by Draxler who posited that partnerships can ensure cooperation, and enrich and build the capacity of the institutions involved. But is the reality as rosy and romantic as this?

In terms of the literature, a number of factors are important in defining effective partnership arrangements. For some researchers, the agency of organisational actors is an important factor. In this context partnerships are ‘expressions of voluntary agency’ (Ashman, 2000: 5). The notion of the agency of actors in educational partnerships is important because it is one of the key determinants as to whether a genuine asymmetrical partnership will be achieved. Yet I have noted elsewhere that ‘agency’ is a complex notion in postcolonial settings such as Lesotho’s (Oliphant, 2008) for it assumes that individuals have a fair amount of freedom and individuality to act without restraint or with some autonomy. This is not always the case in Southern (or non-Western) contexts, for individuals are part of the collective and act in that context. Therefore, I share Draxler’s (2008: 35) view that one problem associated with partnerships is in regard to differing power bases and the learning processes involved. He argues that partners can come together for a common objective, leaving their institutional culture at the door. However, in reality, things are not so simple.

Draxler also highlights the importance of transparency in partnerships. He has acknowledged that in partnerships which bring together a number of institutions with different systems of management, responsibility and accountability, partners can quite easily be pressured into devoting more attention to streamlining the partnership functioning than to ensuring that there is transparency (Ibid.: 34). Effective partnerships are also those in which there is the development of trust, cooperative interpersonal relationships and processes which promote communication, mutual influence and joint learning (Ashman, 2000). In terms of their structure, effective partnerships are viewed by Ashman as having governance arrangements that promote shared control, are horizontal and not vertical, representative of partners and relatively autonomous from funders. Moreover, partnerships are effective, according to Ashman, if both partners agree on their goals and express satisfaction with the partnership. Another essential ingredient in Draxler's view is that in a successful partnership there is partner learning resulting from the capacity to look at difficulties and problems, and solve and progress them together. For Dell (2010), effective UK-Africa educational partnerships are characterised by a shared sense of ownership, an appreciation by parties of the local context, and the need for partnerships to be demand-driven and sustainable.

Against the background of this brief review of the literature, this paper turns to the description and analysis of the partnership between the Lesotho College of Education and the Irish institutions within the CGDE. In subsequent sections, the paper will analyse the LCE-CGDE partnership in terms of the features of effective partnerships described above. These features include the following: collaboration and pooling together of resources, competencies and commitments; the extent to which they are asymmetrical; shared risks, responsibilities and means; mutual even if not symmetrical benefits; agency of actors; shared ownership; and the extent to which they are demand-driven and sustainable.

Africa-Irish Education Institutions Partnership

In 2007 Mary Immaculate College in Ireland established a partnership of teacher education institutions in Ireland and two in Africa including their Ministries of Education. The partnership obtained support under the Programme of Strategic Co-operation between Irish Aid and Higher Education

and Research Institutes (2007-2011). Through this partnership the CGDE was established as a hub for thirteen partner institutions in the Republic of Ireland and Northern Ireland and two African countries: Lesotho and Uganda. Mary Immaculate College was the lead partner with the CGDE housed in it. The CGDE was a coordinating structure with a secretariat for the partnership situated at Mary Immaculate College.

The Centre for Global Development through Education

In the Concept Note for the application to Irish Aid, the Centre was meant to 'increase the capacity of teacher educators in Ireland to support the work of Irish Aid and the initiatives of partner countries in educational research and teacher education' (2007: 1). It was to coordinate existing research and teaching capacity and systematically enhance that capacity. The Concept Note added that:

“The central aim of the CGDE is [sic] to enhance the quality of basic education in partner countries and to enhance access to basic education. The Centre will [sic] achieve this aim by strengthening the field of teacher education and educational research so that the capacity of Southern partners to provide high-quality teachers and to respond to educational need on the basis of high-quality, appropriate research is enhanced” (Ibid: 1).

Central to the work of the CGDE, therefore, was capacity building of teacher educators in research; professional development' education quality enhancement of teacher education; and development of an evidence-based understanding of development and inter-cultural issues in teacher education to inform North-South practice (Ibid.: 3).

The principles guiding the Centre, as articulated by the Director of the CGDE in 2008 from the Irish Aid White Paper (2006: 9) were partnership, public ownership and transparency, effectiveness and quality assurance, coherence and long-term sustainability. The concept of partnership, in terms of the Director's presentation, was understood to cover the following elements: working together for common purposes, cooperation, common aims, activities and goals, pooling of resources, expertise and experience, and promotion of social interrelationships

Governance and Structural Arrangements of the CGDE

The CGDE had a semi-autonomous status within Mary Immaculate College (and Irish Aid) but was not directly involved in its day-to-day running. The Centre had three full-time staff: a Director for the management of the Centre, an administrative secretary and a post-doctoral fellow for facilitating and coordinating the technical, research activities of the Centre. The post-doctoral fellow had extensive experience working in higher education in the South and was employed at the Centre having previously worked at the Lesotho College of Education. At each of the south institutions there was a programme associate coordinator appointed to coordinate the partnership activities at the local level, and to be a liaison with the Centre in Limerick.

The CGDE had a steering committee with two subcommittees that were established later in the life of the steering committee, which was a policy and over-sight structure. It was made up of representatives of all partners (North and South). The sub-committees, in which the South and the North were represented, were the executive sub-committee and the planning sub-committee. While the steering committee met only four times a year, the other committees met more often. Lesotho was represented in these sub-committees, by an officer in the Lesotho Embassy in Dublin. To ensure transparency and accountability, there was a mid-term review of the CGDE in July-September 2009, and, in 2010, a final, summative evaluation was carried out.

The Partnership Main Focus Areas

The CGDE partnership had three main areas of focus in its capacity building of the teacher educators in the North and South. These were the research component, the PhD element and the Teacher Educator Exchange Programme. Each of these areas is discussed below with specific reference to their implementation in Lesotho.

The Research Component

The research targeted the real issues in the South as one of the interviewed College colleagues observed. The research areas were proposed by the Southern partners and accepted as such (I was personally involved in the development of these initial proposals). Two research studies were carried out in Lesotho in the

following areas of current educational policy concern (the same happened in Uganda with different research areas):

- Assessment practices in the education system of Lesotho;
- Identification, assessment and inclusion for learners with special educational needs (SEN) towards a national system for Lesotho.

Both studies were carried out and successfully completed.

The Teacher Educator Exchange Programme (TEEP)

This was a mentoring and shadowing component intended to enhance the teaching and learning effectiveness of those involved (North and South). It involved visits to institutions – primary and secondary schools in both the North and South. It involved four Lesotho College teacher educators and their four Irish counterparts for Mathematics, English, Education (Special Education) and Educational Technology. Four Northern educators spent two weeks in Lesotho, each with a Lesotho counterpart and the same happened to four Southern (Lesotho) educators in Ireland. The programme soon ended before any further exchanges and visits could happen, and before any meaningful reflection took place. Only one visit each way had been completed and there was no arrangement for sustainable follow up activities.

The PhD Component

This was a capacity building initiative with the potential to help those involved, their institutions and countries that was to go on until the end of 2012 as part of an ambitious, three year part-time programme. Each of the participating countries had the opportunity of identifying and enrolling three teacher educators in the areas of their choice with host institutions in Ireland. In Lesotho, the areas covered were Mathematics Education, Science Education, and Education for Sustainable Development.

Summary and Discussion of the Key Features of the Partnership

The Southern partner, Lesotho College of Education, was involved from as early as the conceptualisation of the CGDE and its focus areas. The needs assessment study that informed the establishment of the partnership was carried

out in Lesotho under the direction of the CGDE Director in 2008. Lesotho College of Education participated in the exercise. The research areas of assessment and special educational needs were provided by the College and they were in line with Lesotho's priorities as shown in the institution's and the education sector's strategic plan for 2005-2015, as well as the quality improvement priority of the College. The College researchers were identified by the College itself with the PhD candidates identified and nominated by the College. These are some of the features of a demand-driven development partnership that we can attribute to the CGDE-led educational partnership with which Lesotho College of Education was involved.

The research design and methodologies for the research partnership was participatory and the College participants were directly involved. The main difficulty imposed by distance and lack of resources in the South was that the initiation of most of the work on the research design and instruments was done in the Northern institutions, where a larger number of the partners were concentrated. This in turn caused dependence and weakness of initiative in the South. This kind of dependence does not help to build capacity and confidence but to a large extent and as far as possible, in spite of spatial challenges, there was collaboration and pooling together of competencies and commitments. Although technology can mediate in these cross-border challenges, it remains weak in the South. Lesotho's bandwidth for internet, for example, continues to be very weak.

The Teacher Educator Exchange Programme (TEEP) participants were identified and nominated by their institutions within provided guidelines. This ensured that the partnership was demand-driven. The focus of the partnership was on capacity building in line with the College and the Lesotho education sector's needs and priorities. The College had submitted a shopping list of areas of need and priority and some of these priority areas were drawn from the national education strategic plan referred to above. For example, both in the education sector and at the College there is consistency on 'improving access to quality education with particular focus on the following areas: numeracy and science; literacy in English, research capacity development; and special education capacity development. For these reasons, among others, Lesotho's contributions to the content of the partnership projects and activities helped to develop a

sense of ownership for the partnership in the College unlike in many other North-South partnerships in which some of the decisions are made and concluded in the North.

The CGDE had a steering committee which served as a forum for communication, decision-making and policy review and direction and all partners were represented in this committee. The South and North partners participated openly and freely in meetings of the committee. From time to time as the partnership developed and need arose, the areas of focus were presented to the committee and revised. Lesotho took an active part in the decisions and this participatory feature of the partnership engendered a sense of ownership, mutual responsibility and commitment.

The CGDE budget was managed transparently with all partners involved in budget allocations and receiving the reports of expenditures. In my years of working with development partners as head of an educational institution since 1994 I had not been so closely involved in the running and management of a development partnership to the level of the details of finances, their allocation and reallocation. Notwithstanding all the foregoing positive features of the CGDE-led partnership, there are a number of areas that could have been done differently to ensure that the partnership was effective, had sustainable benefits and impacts, and had most of the features of effective North-South partnerships. It is to these that we turn below.

What Could Have been Done Better?

In Lesotho and Uganda, there were programme associate coordinators appointed from among the existing employees of the Ministries or institutions in Lesotho and Uganda to coordinate the activities of the partnership at the local level. The programme associate coordinator system was a good idea although coordinators were to be remunerated which for Lesotho was problematic as it sowed seeds of unsustainable practices. The coordinator in Lesotho was the Director of Academic Planning, Research and Consultancy (DAPRC) employed at the College. The main duties of the DAPRC involved coordinating projects and programmes that the College was involved in. He was therefore already getting paid for activities such as those supported through the CGDE partnership. This additional payment for the Associate Coordinator

role was therefore money that could have been used differently. It resulted in employees expecting payment for their engagement whenever programmes involving external partners were introduced into the College as they sought to couch these programme chores as additional to their official duties.

Notwithstanding the weakness described above, the system of having a local associate coordinator was good as I have indicated earlier. This arrangement was different from many partnerships or development programmes sponsored by the North which tend to have a Northerner appointed to oversee and coordinate the programme activities from start to end at the implementation locales. The question remains as to whether or not it would not be more beneficial if a Southerner is capacitated to coordinate and manage the partnership at the local level. For capacity development and sustainability, this option could be the way to go provided appropriately qualified people are engaged; reporting and accountability frameworks are well defined and a system of monitoring is in place.

The Teacher Educator Exchange Programme was a good programme with potential for capacity development benefits, inter-cultural awareness raising and global citizenship development opportunities. All those who were involved indicated that they benefitted: they received per diems; they spent time in Ireland and their institutions; they had access to good library and technology facilities; and they worked with Northern partner professionals. These are some of the benefits they mentioned. But the TEEP was too brief to make any meaningful impact and there was insufficient time and provision for the evaluation of the TEEP. This is one programme that should have had more time to develop and mature to support the development of better mutual understanding and appreciation of the participants' differences.

The demise of the partnership in 2011 when Irish Aid support ended led to the closure of the CGDE. The partnership did not quite result in the development of institution-to-institution long-term sustainable relationships. Nor did it leave a legacy of ongoing professional partnerships among the individual teacher educators. In the view of one College-based Southerner interviewed 'sustainability planning was lacking ...research then what?' This interviewee went on to suggest thus: 'I didn't expect the Centre...would be

something that would die. The Centre should always be there' (November 2011),.

Conclusion

In conclusion, therefore, the CGDE-led partnership was one of the few meaningful partnerships with which Lesotho College of Education has had the opportunity to be involved. Although sustainability planning was weak, and comparatively little attention was paid to residual developments such as the South-South partnerships, the CGDE-led partnership was largely demand-driven. It addressed the issues of relevance to the College and Lesotho's education sector. Although asymmetrical relations are an ideal, one cannot claim that the partners, especially at the level of the various projects or activities, had these kind of relations. The programme was delivered over too short a period to observe this. However, the working arrangements and relations at the level of the steering committee and its sub-committees where the author was a direct participant, met many of the effective partnership conditions. There was a strong sense of ownership and mutual belonging and responsibility among members at this level mainly because they regularly engaged on a face-to-face basis. There was also a conscious effort to ensure that everyone was comfortable and participated. All views were listened to and respected even where there was sometimes disagreement. In my experience, even with the weaknesses described, the CDGE partnership was a positive example of a North-South arrangement that had several features of an effective North-South educational partnership. Much can be learnt from this educational partnership, about how partnering for development with the South can be conceptualised, structured and managed.

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Viewpoint

TRAVELLING DOWN UNDER: DISMANTLING THE 'GLOBAL SOUTH'

Fiona Beals

Introduction

Young people in Aotearoa New Zealand (NZ) experience an irony of sorts. They know they are geographically situated in the Southern Hemisphere, but without consultation are taught that 'in reality' Aotearoa NZ is a Northern country in the great North/South development divide. In this article, I will explore the implications of development labels in the Aotearoa NZ education system. I will argue that Aotearoa NZ's discursive position in the North, combined with its recent history of colonisation, has implications in the way that power, relationship and identity are understood and played out in both formal and informal education settings. Recent labels such as 'minority' and 'majority' have just caused more confusion as teachers and youth workers are increasingly dependent on resources produced by the development sector. In effect, for educators and young people, the labelling language of development can result in a disempowering of the players in the educational process – we are so pre-occupied with the 'them' that we cannot see the inequality in 'us'. So, rather than looking for boxes with neatly typed labels in which we can explore and group issues and people, perhaps our pedagogy needs to move to stories of self-definition, transformation and hope.

Coming from the Land Down Under

For those of us growing up in the isolated English speaking countries of the Southern Pacific, we are raised to know that we are not the centre of the world. Early lessons through the school, community and pop culture teach us that we live on the periphery of a centre; a centre not in the middle of the world but lying across European and North American waters. For me, as a young person in the 1980s, one of the greatest pop groups of our times was the Australian band *Men at Work*. One of their biggest hits was 'Down Under'; a song about living down under, in a foreign country far away from some reality; for those of us living 'down under', it was a song that gave us an identity.

The *Men at Work* song was my first exposure to the complex divisions we have in our world. My second exposure occurred in that same year – a gifted world map complete with playable record. I could now journey around the world to the voice of a man from Disneyland. But this map had a serious problem which threw me as a six-year-old. Aotearoa NZ was not in the middle – it was on the edge. In fact, it broke the boundary of the map and looked like it should not have even been there. Aotearoa NZ, on this map, looked like a great sliding fridge magnet.

Through the teaching of *Men at Work* and the unidentifiable man from Disneyland, I learnt the insignificance of Aotearoa NZ's position – we were down under from what was on top and an add-on to the rest, or to be perhaps correct, West of the world. And then our teachers, in a guise of trying to build confidence in being a New Zealander, introduced the upside-down map – our class soon learnt that the emphasis on this map was on the upside-down and that no one (not even my classmates) would buy into something that was the wrong-way round.

However, my personal story of education is situated in the 1980s and 1990s. There have been changes to education in Aotearoa NZ; many arising in reforms during the 1970s and 1980s. A stronger History curriculum has been one of these changes. The generation of the 1980s was one of the first, post colonisation, to learn that Aotearoa NZ had a history before European settlement. Before the 1980s, NZ history was England's history wrapped up in the Magna Carta and Queen Victoria. The predominant ethnic group in our country was not Māori or Pākehā (the Māori word for English/European settlers), they were English. They defined themselves through their proud links back to the homeland (e.g. Wood, 1940).

So, back before the 1980s, if the schools' curriculum associated Aotearoa NZ with the historical European countries of its predominately white population, issues arising from our history of colonisation would be buried under the carpet. Being labelled as a Northern country would have been something of which to be proud; it connected us to the powerful countries and gave us a role to play in the world. But now, under the new curriculum, students majoring in NZ History learn that our country was founded on a

broken treaty between the *tāngata whenua* (people of the land) and the English crown. *Te Tiriti o Waitangi* (the Treaty of Waitangi) brought a false assurance to the Māori people as the settling population saw potential in the land and hope in a secular classless society. Subsequent policy, war and Western disease each played a part in hobbling the future of Aotearoa's indigenous people.

Maybe back in the 1930s, when it was still believed that the Māori people were considered to be a dying race and New Zealand's income came predominately from rural exports to its English homeland (Belich, 1996), it would have been seen as appropriate to adopt labels such as 'North' – more fitting and appropriate to our reality. But, if you ask an Aotearoa NZ classroom today whether a term such as 'North' defines our identity you would find a deep resistance by many Pākehā to identify with a country from which it is generations removed. Furthermore, given that the word Pākehā is also seen by some to be imposed ethnic labelling, you would also find resistance (Corbett, 2001). Instead, you would hear children ask: 'why can't we be New Zealanders? This is where we were born and where we belong. Why do we have to accept any label imposed on us?' You would also hear confusion from indigenous students, maybe even anger, at just another attempt of a colonial labelling of otherness.

Aotearoa NZ – Are we really a Northern Country?

As I ventured into development studies, I quickly learnt that Aotearoa NZ is seen as a Northern country. Coming from a youth work sector and with a formal education degree, I was keen to work with, and empower, young people in my community to make a difference to the world and to their own lives; so I needed to learn more about this 'Northern' label. During this time, I was privileged to work with a group of Māori academics on a development education resource for the UK. However, we were confused as the label 'North' had never featured in our cognitive framing of Aotearoa NZ.

A senior colleague attempted to help us by showing us another map. Rather than having the equator as the dividing line, it had some sort of red-blue divide – a bit like a wave encroaching in on a beach. The wave came down engulfing the Pacific, including Australia and Aotearoa NZ. Again, someone,

with what appeared to be little understanding of the reality of poverty in the Pacific and the statistical divide between poor and rich in Australia and Aotearoa NZ, had changed the world to group my neighbours and I with the ‘oppressing’ Northern countries.

Both my Māori colleagues and I were angered at this labelling. This deepened further, when we were told in simplistic terms that the North/South divide was initially about colonisation – the Northern countries colonised the Southern countries. But in that definition, surely Aotearoa NZ fitted that Southern box? To counter this we learnt that our country had survived colonisation and that the indigenous people were not exploited as a result. You can probably imagine the reaction of my colleagues at this last point.

This was exactly where my problem lay. I had no problem being connected through my own personal *whakapapa* (history of connections) with the North. However, the politics of dividing the world into North and South and redefining Aotearoa NZ as a Northern country meant that the very real, and reverberating, aftershocks of historical injustice were completely overlooked. Māori, alongside the indigenous people of Australia and the people of the Pacific, were invisible in this divide.

We were asked to launch our contribution to the development resource in London. When we got there, we actually voiced our confusion. Somewhere along the line someone decided that *te Tiriti o Waitangi* worked; our history of colonisation was a success. Our counter argument was that the land and climate was more suitable for European habitation and exploitation – but colonisation a success? Ask the people of Parihaka, who in an act of passive resistance experienced horrific torture, and the proud people of the Urewera who never signed *te Tiriti* but were still made subject to its conditions (and the subsequent injustice to it) (Belich, 1996). Ask the street kids in Auckland and the children struggling for dental hygiene in Northland where poverty disproportionately affects Māori households (Expert Advisory Group on Solutions to Child Poverty, 2012). Ask the kids in Alternative Education (O’Brian, Thesing and Herbet, 2001) and ask the reporters who insist that bad news in New Zealand always involve a brown face (Beals, 2006).

Here in Aotearoa NZ, the economic dimension and definition to such labelling plays less of a part in words such as ‘North’ and ‘South’. Economics is acknowledged but attributed closer to words such as ‘developing’, ‘developed’ and ‘emerging’. These are the terms that youth workers and teachers prefer to use in teaching development issues which create a clear division between the income levels of countries relative to that of Aotearoa NZ. However, the classroom (both formal and informal) is a contested and political space, and the language of labelling coupled with the art of political correctness often creates confusion for educators as those constructing development education resources jostle for dominance in terminology and change language without consultation.

Today, you would be less likely to find the words ‘developing’ and ‘developed’ in resources, the preference has tended to be ‘North’ and ‘South’. But in Aotearoa NZ educational settings, such terms are not interpreted economically but socially and politically. Words like ‘developing’ and ‘emerging’ even cause complication, as the demographics of our young population changes. We are encouraged by our government to look outside the traditionally labelled ‘developing’ countries to our Pacific neighbours – once labelled as tourist destinations, these countries are now seen economically as places of poverty, inequality and disadvantage; they are major recipients of New Zealand aid. Counter to this, Pacific youth are now the fastest growing population group in Aotearoa NZ (Ministry of Pacific Island Affairs, 2005). As poverty is seen collectively in the Pacific as a condition of shame, labelling, even if for educational purposes, imposes such shame on Pacific youth and the flow through into our negative statistics is, for many of us, a disgrace. In our own lesson of the past few decades, we are learning about the impact on a people’s self-identity when ‘we’ label them but fail to consult those being labeled.

‘North’ doesn’t work, but surely we can find a place in the ‘minority’/‘majority’ language?

After talking about our ‘down under’ perspective and confusion with labelling in London, I became a writer of youth work resources for community education in a development NGO. I came to this job in a changing climate – I was to write about global issues with a focus on development and a particular group of countries. In my new role, the words ‘North’, ‘South’, ‘developed’,

‘developing’, ‘first’ and ‘third’ were to be replaced with new and improved words: ‘minority’ and ‘majority’.

There was a really good reason for this. The term ‘majority world’ was designed to recognise the global nature of issues; the reality that issues are not limited to nation states. It was coined to recognise that poverty is an issue in Aotearoa NZ as it is an issue in every country. It was not designed as a box into which you could group countries but a framework of thinking to show that people share a common struggle across countries. In contrast, ‘minority world’ referred to those who held power, not only in Europe and North America but also in Asia, Africa and Latin America.

However, what seemed to make sense had added confusion attached to it. Because of the funding conditions attached to our organisation at the time, development resources had to be linked to countries of priority and need. So, even though I knew the definition of majority world, I found myself having to label countries like China as pertaining to the majority world and countries like the United States as belonging to the minority world. I then found myself tasked with having to educate the readers of these terms and their ideal meanings. Confusion reigned. And it is of no surprise that readers would say to me: ‘But isn’t this political correctness gone too far?’ Yes, to me it was, especially when I began to read materials coming from countries in the ‘South’ which still used the terms ‘developing’ and ‘Third World’. I soon recognised the reality that the new definitions did not arise from the oppressed, but that the teachers and students we worked with were right – they were labels created by the powerful (powerful in the creation of our knowledge of development) and the definitions did carry an element of political correctness. However, perhaps the biggest lesson was seeing the re-emergence of ‘Third World’ – both in self-determined development and in pop culture. It seemed to me that Foucault’s (1976) idea of resistance and the subversive play of language were coming to the fore. The people to whom a derogatory label once applied were using it to redefine both themselves and the label. However, the ‘West’/‘North’/‘developed’ had moved on to redefine a new reality and weren’t listening.

Just who does all the labelling?

In all of this, it appears that whoever is doing the labelling is not consulting the labelled. Issues are being addressed in each revolution of definition but the reality is, simplicity is lost in so much complexity and we are failing to ask ourselves: why do we have such an obsession with putting people(s) into boxes? And, then at the point in which I was writing words into resources, what does this mean for education in Aotearoa NZ? What does this mean for our classrooms, our students and our own identities as educators? The reality is labels like ‘developing’ and ‘developed’ are still the preferred terms even though they carry baggage. Labels like ‘North’ just pull up resistance and the majority/minority words work in principle but are difficult to speak into people’s lives and mindsets – where do you put whole countries when you are trying to teach about development? At the end of the day, it came down to two points. First, we need to educate the community about the evolution of terms and language. However, second, we should not expect the community to use ‘our’ language. If we are real to our *kaupapa* (our principles and ideas) of development and if that *kaupapa* acknowledges the importance of self-determination then shouldn’t we be prioritising the role and authority of a community to name itself, even if that name comes with historical baggage? If a community chooses to use the terms ‘Third World’ to define itself, then perhaps we need to ask why and look for possible resistance rather than assuming ignorance.

But there is even a deeper question, reflected in my own country’s story of development, one in which the colonised prospered, unfortunately, by hobbling the indigenous people. We do have stories of Māori success. But equality in a ‘successfully’ colonised country is much more complex than a history book of the 1950s tells us. Furthermore, we also have many Pākehā poor in Aotearoa NZ, and their stories are often silent and invisible – blamed on a dysfunctional work ethic.

We are told by our Children’s Commissioner that 25 percent of our children live in extreme poverty (Expert Advisory Group on Solutions to Child Poverty, 2012). For these children, the words ‘majority’/‘minority’ would give them a voice in the story of global poverty. But this would not be in the context

of development education where teaching, and the resources supplied by development NGOs to supplement teaching, focus on giving an Asian or African face to poverty.

Moving from Issues to Bring in the Third Dimension

No matter what the terminology, when we teach about the global differences through issues-focused education we risk divorcing global issues from local realities. If we take a concept and issue like poverty, and look at global differences, we potentially silence the stories of our own students living in poverty in our classrooms. We need to ask: is their story worth less in the bigger educational picture? Should they be quiet while we focus on the real big issues? I would suggest that, in our silencing, we exclude, or disempower, these students. Furthermore, when we focus only on the desperation of poverty in developing contexts, we tend to show a hopeless situation in which the only way out is dependence on a richer wealthy donor.

This is especially apparent in Aotearoa NZ, where global education is very much 'us' and 'them', global connections are made through aspects such as consumerism and capitalism, but the actual teaching of issues is restricted to countries outside of Aotearoa NZ. No real connection is made beyond the wallet, the sweatshop and charity/aid. Most New Zealanders would agree that poverty is a reality here, but it is not a topic for teaching in classrooms and the historical connections to current inequalities are still limited to tertiary level qualifications and the optional subject of New Zealand History. As global educators in Aotearoa NZ, our own climbing statistics of poverty has seen teachers and youth workers ask for development resources that empower teachers and learners to discuss such subjects ethically within both a global and New Zealand context.

Perhaps the key challenge is to not use the issue as a point of connection for education and understanding but rather find a space to reframe issues through stories of hope. Why? Because, at the heart of it, any pedagogy that requires a labelling of people around issues can disempower both students and the labelled countries and people. Teaching through issues creates relationships around needs, and teaching for the purpose of hope gives students a connection beyond need.

In an 'issue-focused' approach which is common to development resources, we risk creating a two dimensional picture of poverty. On the first dimension, it is an issue of the developing world; on the second, it is an issue that can only be addressed by the developed nations – a sort of 40-hour famine in a classroom lesson – poverty is there and you are the solution. In this two-dimensional story, we miss a third dimension. Communities living in poverty also have their own stories – stories of survival and also stories of transformation. Often the stories of transformation include and are carried out by the youth. They are stories that encourage hope but can also build compassion as the link goes beyond the issue to both the story behind the issue and the hope that we all have for a better future.

But why have this emphasis on hope and compassion? Over the last decade, the work of Paulo Freire (1972) has played a major role in global education in Aotearoa NZ, as it has internationally. The basic premise in global education using his approach is to encourage a moment of cognitive dissonance (a moment of conscientisation) so that issues are explored, problems are proposed and a dialogue occurs. However, we have also found a problem in using Freire's original work – a problem of intention. Freire's intention was that his pedagogy would enable the oppressed to read and rewrite their world. As a pedagogical approach, it is problematic to use with students from advantaged backgrounds; awareness of problems and a need for rewriting can occur but the reality is that the power dynamics remain in the control of the oppressor.

Rather than using Freire's (1972) work, global education may be better informed by Freire's *Pedagogy of Hope* (1992). This text underpins Freire's ontological basis for his pedagogical approach – hope in a world of inequality where the marginalised and advantaged work together. Combining Freire with Emmanuel Levinas' (1969) work on compassion allows for global education to move beyond issues to hope a space for the exploration of ethics of relationship. The aim of such an approach is to bring into the third dimension a reflexive moment, where young people are not just dialoguing but listening in their dialogue. In this moment of listening, care would be taken to allow people to identify themselves and their own contextual identity rather than imposing a

label and to listen to the hope in their stories while learning the raw stories that led to inequalities.

As two young people found in exploring the role of youth participation in addressing poverty, lessons go beyond the issue itself to a greater understanding of the role young people have internationally in addressing issues in their own communities:

“Before we read the chapters [on participation], we assumed the majority [sic] world would not have an interest in youth participation. After all, we thought, they have bigger problems like poverty and inequality. However, as we read, we realised that it is precisely because of these ‘problems’ that youth participation is so needed and effective. It is about time that we listened to young people in other countries and communities” (Williams, Edlin and Beals, 2010: 289).

Conclusion

We will always want a label in which we can have a clearly defined and containable box. However, the least we can do as educators is to give our students an opportunity to dismantle the boxes that have been developed over history by focusing beyond the issue to the hope that is in all of us. As Freire once observed, the role of a progressive educator is to ‘unveil opportunities for hope, regardless of the obstacles’ (1994: 4).

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Resource Reviews

SOUTHERN THEORY: THE GLOBAL DYNAMICS OF KNOWLEDGE IN SOCIAL SCIENCE

Review by Su-ming Khoo

Readers of *Policy and Practice* may find it rather unusual to see a review of a book that is not newly published, but that has been out for several years. However, it has not gained wider popularity, despite a good number of scholarly citations. This is an important book and one that demonstrates the benefits of critical, yet wide and unspecialised reading. As a development educator and a social scientist, I feel that I should have been discussing this book with colleagues and students since it first came out. I see it as a resource that should have more currency in our community of practice.

The basic argument in this book is that social science, as we know it, is reductively 'Northern'. To become properly global, world social science must democratise to include significant Southern theoretical voices and debates. These have been disregarded and marginalised by a social science practising an ersatz metropolitan version of universality. Connell engages substantively with a range of Southern theorists, showcasing their diverse contributions to social theory, while arguing for their relevance which is grounded in particular political, economic and cultural experiences. These works are disciplinarily rich, drawing insights and analysis across history, anthropology, psychology, philosophy, economics and cultural studies.

Southern Theory is undoubtedly a major work from a writer who has made distinctive contributions to the debates on gender, power and culture. This book extends Connell's concerns with problems of gender power and domination to more general problems of global power and knowledge and pertaining to the social sciences and sociology in particular. It will therefore be of especial interest to social scientists and sociologists, but this is by no means a dry and specialist contribution. It is a lively, open-minded and mind-opening product of decades of broad reading and critical engagement. I can thoroughly

recommend it to any non-specialist reader who puzzles over the place of theory in relation to experience, thinking, faith or politics, and who worries about how to think and explain the relationships between the global North and the global South. The author has ambitious aims to shift the ground of social theory with this book. Most readers will find this an intellectually challenging, enriching and relevant read, and will find something new in the wide span of material encompassing a range of writers, writings and issues from the South and Antipodes. Reading this also refreshed my thinking about the 'business as usual' of Northern social thought and opened up new connections and avenues for critical thinking across political economy, gender, religion and culture. Considering the breadth and unfamiliarity of much of the material, and the depth of critical analysis, this book is very readable and accessible.

The volume is divided into four sections. The first section is a long prologue on 'Northern theory' with three chapters covering the relationship between empire and the creation of classical social theory and sociology, a discussion of general social theory focused on three important sociologists (Coleman, Giddens and Bourdieu), and a chapter on theorising globalisation. Northern theory is notably abstract, and characterised by the absence or routine denial of the historical context of imperialism and of relations of power and domination. Connell's critique centres on how the South is known but never the knower, construed as a source of data for metropolitan theorising, while theory that arises from the actual social experience of the South is excluded.

Knowledge about the South tends to be acquired by Northern authors, for use in Northern debates, while Southern debates which were rooted in the real situations faced by Southern intellectuals have been marginalised. Global social theory similarly claims to be cosmopolitan, while really being metropolitan. Even where globalisation theory is critical, questioning the neoliberal market agenda, it rarely challenges how global knowledge of 'the social' is constituted. Even respectful studies of the periphery largely function as sources of data, filling in thought categories created by metropolitan intellectuals (p. 66). Hence, political economy is a Northern artefact, even though Connell acknowledges that some studies, for example, those done by world-systems theorists, are admirable and even creative (p. 67). In place of an over-arching Northern theory, she would prefer to see more links across Southern theorists

and peripheries, drawing inspiration from the Australian feminist Chilla Bulbeck's 'complex relativism' that allows for international cooperation across diverse bottom-up initiatives (p. 85).

The second and fourth (concluding) sections of the book, entitled 'Looking South' and 'Antipodean Reflections', sandwich the large section on Southern theory between reflections from the author's own particular location - Australia. The insightful positioning of her engagement from a global periphery has resonant echoes for Ireland, provocatively and productively positioning reflections from a small, wealthy (de)industrialised 'Northern' country, far from the metropolitan core and burdened with the anxieties of the 'cultural cringe' (Allen, 1950, cited in Connell, p. 72) which characterise intellectual production in the periphery. At the same time, Australia is the place of the oldest continuous known human civilisation, that of the Australian Aborigines who have suffered devastating colonial histories, from dispossession to the trauma of the 'stolen generations'. This adds thickness and complexity to her critique of social science as an 'immaculately Eurocentric' (p. x) project and lends a personal dimension to her engagement with the problems of dependence.

The substantial third section of the book engages with four milieus of social thought across the global South that have tangled with, and challenged, the problems of economic and cultural dependence: 'African Sociology'; modernising Islam in Iran; Latin American debates about dependency, autonomy and culture; and subaltern and postcolonial thinking in India. To summarise Connell's position, ignoring these bodies of thought wastes a huge resource for learning - 'a body of writing about the global in which Weber is a major point of reference, but Al-Afghani is not, defines itself as profoundly limited' (p. 64).

The first part of this section is about the 'African Renaissance' thinkers and Connell's reading is both balanced and critical. She carefully explains Akiwowo's concept of an indigenous African sociology based on oral traditions and divination and the critics of Akiwowo who question culture-bound ideas of knowledge. The critics argue that this may lead to an over-simplification of African realities and a failure to acknowledge that these Africanist ideas may represent the outlook of a narrow group of privileged traditionalists. The

debates seem to show that the high hopes raised in the 1980s that indigenous sociologies would challenge metropolitan sociology have not been fulfilled (p. 96). Indigenous African philosophies have become a vehicle for the assertion of African dignity and creativity, reprising the Negritude movement of the 1930s and 1940s (p. 101). This assertion of dignity is important, given that African intellectuals have suffered from repressive regimes demanding ideological conformity as well as from neoliberalism and structural adjustment programmes that have left few resources available for the Africanisation of social thought.

Connell's reading of Islamic thought on the problem of Western dominance, is represented by three Islamic modernists who influenced Iran's Islamic Revolution: Al-Afghani who wrote *Refutation of the Materialists* at around the same time that classical Northern social theory emerged, the 1880s; Al-e-Ahmad's 1962 tract *Gharbzadegi*, or 'Westoxication'; and Ali Shariati's Islamist polemic against imitative bourgeois culture and imperialist cultural domination, also written in the lead-up to the Iranian Islamic Revolution. Her approach to these readings is broadly liberal, pivoting around the rationalist concepts of *tawhid* (divine unity vindicating the universality of science) and *ijtihad* (freedom of thought, interpreted in Connell's reading as also meaning 'scientific adventurousness' and 'knowing both cultures'). In practice, *ijtihad* and *tawhid* are highly contested by clerical forces, who advance the contrasting doctrine of *taqlid* (deference to clerical experts) and 'closing the door of *ijtihad*'. Connell notes that Al-e-Ahmad's 'Westoxication' pre-dated Edward Said's famous critique of Orientalism by some two decades, but its vision of Western cultural domination is 'in a way more frightening' since it is more about the colonised than the coloniser, and relies on a sustained inauthenticity on the part of the colonised subject (p. 121). Connell is enamoured of the Farsi term '*rushanfekr*' signifying an intellectual who takes responsibility to understand the concrete situation of their own society, grasp its 'inner truth' and spread the understanding to others (p. 136).

Connell's scepticism of things Marxist, neo-Marxist or even cultural Marxist is a bit problematic in her discussion of the Latin American dependency school which really defines neo-Marxism from political economy to world-systems theory. She criticises the Chilean author Brünner's work on cultural globalisation and postmodernity for being too 'Northern' in its assumptions

and language (p. 140) because he uses UN statistics to write about inequalities. Should we really consider world statistics on inequality to be specifically 'Northern' since they essentially provide a common reference point for the North and South? Does the use of United Nations (UN) statistics necessarily and exclusively vindicate only the North's need to 'know', but not the South's need to 'know about' inequalities? (p. 141) Basic statistics about trade surpluses and deficits formed the very core for the work of CEPAL (the Economic Commission for Latin America) and the work of UNCTAD (the United Nations Conference on Trade and Development) that followed in the 1960s (p. 140ff). These figures allowed Latin American theorists to distinguish the centre from the periphery and analyse the mechanisms of neo-colonial domination and injustice. The growing trend towards inequality was the sticking point that led to Cardoso and Faletto's subsequent emphasis on the importance of democratisation for development, a work that Connell commends. Dependency and world-systems theorists will find Connell's account somewhat incomplete, though it is sufficient to demonstrate that Latin American dependency theorists had come up with a more sophisticated analysis several decades ahead of most Northern analyses of globalisation. Connell also interestingly picks up the work of García Canclini to conclude the section on Latin American thinking, particularly the theory of consumer mobilisation, as a potentially positive force for multiculturalism and democracy (p. 163).

Indian contributions to social theory are represented by subaltern and postcolonial studies. Connell queries the gender angle throughout the survey of Southern theory even where Southern theorists may have paid gender scant attention. Connell is critical of much of Indian feminism, as contributing a lot to empirical knowledge but not so much to feminist theory as such. She attributes this to the difficulty Southern intellectuals have in ignoring the metropolitan nature of intellectual production and perceives that Indian subaltern studies has drifted towards conventional (read Northern) postmodernism (p. 172). She is dismissive of Vandana Shiva's ecofeminism as righteous rhetoric, and is irritated by her generalisations and misunderstanding of eucalyptus trees (p. 174). She is, however, impressed by the sophistication of Indian subaltern theorising of power and dominance, Das' anthropology of

critical events and Ashis Nandy's psycho-cultural analysis of the complicity and interdependence between the coloniser and the colonised.

To some extent Connell's complaint about the Northern-ness of social science is not really new – Talal Asad's critique of anthropology raised the issue decades ago (Asad, 1973, cited in Connell, p. 66). This book provides us with a body of Southern theory and reminds us about the general disinterest of modern social thinking in place and material context. Her Antipodean gaze specifically rests on the issue of land, its connection to people and the profound problems raised by dispossession (p. 206). While rejecting the generalisations and Northern-ness of social theory, Connell does not reject generalising or theorising as such, seeing that generalisation is needed to communicate ideas and test them and for knowledge to grow. For social science to work on a world scale, we need the ability to name the metropole and register different situations in metropole and periphery. We need to overcome the erasure of the periphery and need the capacity to recognise its difference and dynamism. Then we need to connect different formations of knowledge to each other and this book makes a real contribution to building up such capacities.

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INTERNATIONAL EDUCATION: EDUCATING FOR A GLOBAL FUTURE

Review by Jennifer Watson

“Central to [the] promotion of global citizenship is an understanding of cultural diversity and an emphasis on intercultural learning” (McMahon, 2011: 19).

Writing from the perspective of a teacher educator, Margery McMahon suggests that her book ‘is designed for practitioners who are beginning to engage with international activities in their schools and for beginning teachers looking at International Education and citizenship education as part of their initial teacher education’ (2011: xvi). A great deal is presented in this slim text from definitions of international education and its development as an area of study, through an exploration of how these ideas could be used constructively in classrooms, to concrete examples of such ideas in use. However, the style is clear and should be easily accessible to the target audience, primarily educational policy makers and both pre-service and post graduate teachers.

Each of the six chapters begins with a list of the key ideas to be introduced, followed by a short introduction which provides more information on the ideas and questions to be addressed. Sub-headings within the chapters make it easy to track the main arguments. The first chapter clarifies what is meant by ‘International Education’, the term used in the Scottish context in which the book was written, to refer to the cross-curricular learning area identified as the ‘global dimension’ in England or ‘international dimension education’ in Wales. It is argued that international education can be used as an aid to understanding our complex, heterogeneous society. Where international education is used as a cross-curricular and interdisciplinary strategy, McMahon suggests that it can be inclusive, involving and motivating, thus leading to positive attitudes among learners and improved attainment, school practice and effectiveness. She suggests that ‘initiatives that develop an international understanding can extend pupil learning in a holistic and integrated way’ (2011: 4).

Chapter two considers the context for international education, arguing the need to educate young people about the world and enable them to gain an

understanding of citizenship. While taking note of the statutory obligation to provide citizenship education, subsequent to the ‘Crick Report’ (1998), it is suggested that in the subsequent years it has become necessary to extend perspectives beyond the nation state to global concerns such as environmental problems, climate change or terrorism. It is argued that ‘Central to this provision of global citizenship is an understanding of cultural diversity and an emphasis on intercultural learning’ (2011: 19) together with a need in the coming century to move beyond multiculturalism to interculturalism. Attention is drawn to the UNESCO *Guidelines on Intercultural Education*, which suggest that ‘Interculturality presupposes multiculturalism and results from “intercultural” exchange and dialogues in the local, regional, national or international level’ (2006: 15). McMahon also notes that these guidelines emphasise the need to respect the cultural identity of the learner and provide appropriate cultural knowledge, skills and attitudes both for full participation in society and to encourage respect for other groups and nations.

Each of the nations in the United Kingdom (UK) has a different governing document for implementation of international aspects of the curriculum, but chapter three identifies the commonalities, while largely focusing on the Scottish context (the author is based in Glasgow and has a background in Scottish teacher education). Note is made of the need for Scotland to develop international links following devolution and the parallel recognition that pupils should have international awareness. The presence of international students in further and higher education is noted in terms both of being aware of their needs and of their economic importance to educational institutions. The chapter outlines the knowledge of the rights of children, safeguarding and international perspectives which should be expected of newly qualified teachers, those seeking full registration and of those applying for headships, again in the Scottish context. It concludes with a brief summary of the ways in which non-governmental organisations and development education centres can support international education.

One of the strengths of the book is the way in which the background context is brought to life through case study examples such as those described in chapter four. These demonstrate practical applications of the theory developed in the earlier chapters and illustrate how international education can be used in

cross curricular work to develop ICT and language skills as well as respect and understanding of different cultures through personal contact with pupils in schools in other countries.

Whilst appreciating the experiences of those involved in the case studies outlined in chapter four, the subsequent chapter considers how to evaluate the impact of international education. It notes the difficulties experienced in evaluation of this non-statutory aspect of the curriculum but also considers the relevant part of the Scottish policy document 'International Education: Responsible Global Citizens' (2010) and discusses research into the 'International Dimension in Education in Wales' (2009). This latter report suggests some self-evaluation tools for schools, but notes difficulties in quantifying results, suggesting that there may be a need to recognise qualitative results as well as those which can be quantified.

The final chapter looks forward, reiterating the need to move from considerations of multiculturalism at home towards interculturalism and an international perspective, but we are reminded of the teacher educator perspective of the author when it is suggested that 'The quality of the international experiences that pupils will have is highly dependent on the skills, knowledge and cultural understanding of their teachers' (2011: 67). It is further argued that international education for teachers can provide opportunities to learn from international colleagues and encourage teachers to consider education for the future of world resources, environmental factors, etc., both locally and globally, when they are working in school.

Ideas which recur throughout the book include the suggestion that:

"...the growing emphasis on eco-awareness and activism means that sustainable development education is allied to and intertwined with citizenship education and international education.... For teachers, it requires that pre-service and in-service provision is designed that helps develop the political and eco-literacy that will enable them to get the deeper and critical understandings and professional skills that are needed to teach in a global context and for a future that is both assured yet unpredictable" (2011: 71).

In summary, the book is clearly structured and written to demonstrate a need for teachers to have critical understanding of their responsibilities in developing future global citizens. The author examines ideas about the basis and definition of what can be understood by international education, considers its development as an integral contribution to the curriculum in schools and explores practical implementation through case studies. Although it is written in a Scottish context, this book is clearly structured and written in a way that should be easily accessible to pre-service and, especially, to in-service teachers throughout the UK. The author should be congratulated on achieving so much in such a small volume.

Margery McMahon (2011), *International Education: Educating for a Global Future*, Edinburgh: Dunedin Academic Press.

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DEMOCRATIC CITIZENSHIP IN SCHOOLS: TEACHING CONTROVERSIAL ISSUES, TRADITIONS AND ACCOUNTABILITY

Review by Róisín Boyle

This publication is a compilation of articles on the timely topic of education for citizenship which are organised in three sections based on the themes of democratic schooling, teaching controversial issues and accountability. This book is an outcome of the international seminar series at the University of Edinburgh, organised by the Citizenship and Democracy Network of the Scottish Educational Research Association, and the rationale for the selection of themes is based on the insights of the sociologist C. Wright Mills. The aim of the series was to represent a wide range of international perspectives on citizenship. But since the seminar was held in Edinburgh, all but three of the contributing authors were based in Scotland and England, with two from the USA and one from Denmark. The book's range of perspectives can therefore be considered to be narrow regardless of the initial objectives. Indeed, many of the contributors refer to the same British policy reports and institutions, for example, the 'Crick Report', Her Majesty's Inspectorate of Education, and the Curriculum for Excellence. Most of the authors are academic researchers with only four out of thirteen representing the teaching community. The book's concept was to integrate three perspectives – research, policy and practice – on each theme, which has been accomplished although not necessarily with equal weight.

The editors envisioned the target groups for the book to be policy makers, researchers, students and practitioners who are interested in developing forms of citizenships in schools: 'The book is envisaged as a stimulus for discussion in staffrooms, seminars and policy forums'. A more suitable audience would be academic researchers and students of advanced programmes (MA or PhD level) interested in this particular topic and I would recommend this book to such an audience. They will benefit from the large number of references and in-depth representation of the Scottish and English scholars in this field. Policy-makers, however, are unlikely to be attracted to this resource as the contents are too specific, retrospective and the conclusions too diversified to

be utilised in policies affecting the general public. Practitioners may find it difficult to utilise any of the presented concepts in their work. Specific models with sufficient amount of details are not explicitly presented in a way that would be more beneficial for teachers.

The title and the division of the book into three parts give the impression that the articles are multi-faceted. The layout and presentation do little to enhance the book. It is fragmented into too many independent, rather short articles including shorter sections with introductions and conclusions. Consequently, introductions and conclusions often overlap giving the impression of repetition. The layout is limited to plain text without any illustrations or graphic representations. The text is saturated with references but there is little contribution of original research work from the authors.

The first part of the book entitled 'Democratic Schooling' failed to present diversity of perspectives. All three authors seem to share the same perspective which is essentially neutral and unlikely to stimulate debate. They present, with very adequate quality, the dominating historical and current views on democratic schooling in the context of citizenship. There are two distinct issues covered in this part: education for democratic citizenship and democratic execution of education in general. The approach of placing them together may be found confusing by less experienced readers. Gary McCulloch separates these issues while Danny Murphy has decided not to. Leif Moos attempts to link his article to accountability postulating requirements towards equality in schools. The distinctions between equality and democracy appear sometimes neglected in this book and there is no notion that democratically accepted policies represent interests of the majority of the public but not necessarily to ensure equality and satisfaction for everybody.

It should be perhaps clarified more explicitly in the title of the second part of the book - 'Teaching Controversial Issues' - that this section is still correlating or referring to citizenship education. The first article by Carole Hahn is the most outstanding work in the book covering all aspects of education - practice, policy and research - as intended by the editors. She also presents her own research and practical examples of how to approach teaching controversial issues in the context of citizenship. Alan Britton has had personal

experience of teaching, researching and policy-making, but his article fails to convince or to separate the three objectives in the way that would be understandable for readers who may be familiar only with one of the fields. On the other hand, he highlights indoctrination as a key risk factor in teaching controversial issues and achieving the objective of democratic schooling. The decision to use the context of the 11 September 2001 attacks on New York and Washington by the author Rita Verma as a background for teaching controversial issues is in itself controversial, as it might be considered more of a unifying than divisive factor. Cultural factors and stereotyping are brought to attention but regardless of their significance they do not directly correlate with democratic citizenship. Globalisation or global citizenship can be considered a better example presented by the same author as a controversial issue.

The third section on 'Accountability and Education for Citizenship' focused on assessment and accountability. Public expectation is that schools would be accountable for creating effective democratic citizens. There are official policies in place aiming to address accountability of education for citizenship. It is straightforward to assess accountability for learning through standardised tests which are already in place, but it is more complex to assess accountability for the objective of producing responsible democratic citizens. Richard Pring suggests that successful education for citizenship would require separate assessment for general learning and assessment for citizenship accountability. I would agree with this observation but neither the author nor any other contributors to the book have been able to propose any particular model for the former's assessment.

Ken Greer gives an account of the conflicting requirements of the education system and concludes that education for effective citizenship is difficult to inspect. It is difficult for schools to strike an appropriate balance between fulfilling direct learning requirements and delivering society's wider expectations. Ken represents the official body established for the assessment of education (HM Inspectors of Education). In her article, Alison Peacock represents the view that school leaders should be accountable first and foremost for the quality of children as citizens developing the skills of leadership for social justice. This can be found controversial as an approach likely to compromise the quality of education in such fields as linguistics and natural sciences,

carrying similarities with the socialistic policies that historically failed in the Soviet Union and countries of the Eastern bloc. This approach may be favourable for practitioners as a straightforward policy to satisfy parents and the public in the short term and to avoid controversial issues.

The last article by Henry Maitles, ‘Conclusion: Half Full or Half Empty?’, suggests a dilemma with regard to either positive or negative interpretations of the current status of education for democratic citizenship in UK schools. He concludes that there are ‘examples of excellent work going on to develop young people’s interest, knowledge, skills and dispositions in areas of citizenship and democracy’. On the other side, there are unresolved issues such as inadequate knowledge/skills/values etc, curriculum overload and lack of teacher confidence in dealing with controversial issues related to citizenship. These perfectly just observations are likely meant to serve as a general conclusion of the whole book, but unfortunately are not very constructive.

The issues discussed within this book are relevant to the concept of development education (DE), dealing with the question of citizenship at both the local (mostly) and global (sporadically) levels and empowers learners to contribute to the process of change within society. The term ‘citizenship education’ is a more specific way of addressing the social structures and processes that shape citizenship but is clearly intertwined with issues of human rights, global justice, environment and survival. In the life of the school, DE empowers children and young people as global citizens and equips them with skills, values and attributes for learning, life and work towards progress. The current rioting linked to the Union flag protests in Belfast not only highlights the importance of citizenship education but also suggests that the current citizenship curriculum or its execution fail in some Northern Ireland schools.

There is a general introverted approach within this resource, as to be expected for a group of specialists of a narrow field such as citizenship education. They do not address the popular issue of increasing immigration and the impact of the new immigrants on the democratic ‘majority based’ view of the UK citizenship. In Scotland there is a strong campaign towards independence that is not addressed either. The book presents a comprehensive overview of the problems and challenges associated with education for

democratic citizenship, but offers few solutions and it is unlikely to stimulate any actions. Nevertheless, I believe that a large fraction of readers of this journal will find this book as a useful reference resource when researching citizenship topics in education.

Jane Brown, Hamish Ross and Pamela Munn (eds.) (2012) *Democratic Citizenship in Schools: Teaching Controversial Issues, Traditions and Accountability*, Dunedin: Edinburgh.

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